

Online Electronic Case Filing Manual

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- Using Netscape
- Login Instructions
- Open a Case
- Converting Documents to PDF
- Voluntary Petition
- Upload Creditor Matrix
- Motions/Applications
- Answer/Response
- Notices
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Online Electronic Case Filing Manual

■ ECF Reports

- Set Up Automatic Mail Notification
- Docket Sheet
- Query Module
- View Transaction Log
- Cases Filed Report
- Pending Deadlines/Hearings Report

How to Use this Online Guide



Page back or page forward



Undoes a change of page or view, or redoes a change (Go Back/Go Forward).



Go to first page of this guide.



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**BK EVENT CATEGORY:
Dictionary of ECF Events**

(A)

Event

Hypertext link

Acknowledgment of Receipt of Transferred Proceeding (<i>csd 3035</i>)	Court Events
Acknowledgment of Transfer	Claims
Addendum to Record on Appeal	Appeal
Amendment	Other
Amendment - Adding new names or changing addresses (fee)	Other
Answer to Involuntary Petition	Answer/Response
Appellant Designation	Appeal
Application for Compensation	Motions/Applications
Application for FRBP 2004 Examination	Motions/Applications
Application for Final Professional Compensation	Motions/Applications
Application for Interim Professional Compensation	Motions/Applications
Application to Employ	Motions/Applications
Application to Employ Auctioneer	Trustee/US Trustee
Application to Excuse Debtor(s) from 341(a) Meeting	Motions/Applications
Appointment of Trustee in Reopened Case (<i>csd 1491</i>)	Court Events
Appointment of Successor Trustee (<i>csd 1030</i>)	Court Events

(B)

Balance of Schedules and/or Chapter 13 Plan (<i>csd 1099</i>)	Other
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(C)

Certificate of Readiness of Reporter's Transcript	Court Events
Certificate of Service	Other
Chapter 7 Voluntary Petition (fee) <i>bare bones</i>	Other
Chapter 7 Voluntary Petition, Schedules or Statements Due (fee)	Other
Chapter 7 Voluntary Petition, all schedules & statement (fee)	Other
Court Certificate of Mailing	Court Events
Cross Appeal (fee)	Appeal

(D)

Default Judgment	Orders/Opinion (Other Orders)
Declaration	Answer/Response
Declaration Re: Electronic Filing (Court use Only) <i>csd 1801</i>	Other
Discharge Requested	Court Events
Discharge of Debtor	Court Events
Discharge of Debtor (Nunc Pro Tunc)	Court Events
Disclosure of Compensation of Attorney for Debtor (<i>csd 1099</i>)	Other

(E)

Exhibit	Other
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(F)

Final Installment Payment	Court Events
Findings of Fact & Conclusion of Law	Orders/Opinion (Other orders)
First Meeting of Creditors	Court Events

(I)

Interrogatories	Other
Involuntary Petition	Other

(J)

Joinder	Other
Judgment	Orders/Opinion (Other Orders)

(M)

Memorandum Decision	Other
Memorandum of Points & Authorities	Answer/Response
Memorandum Re: Return of Documents Under Seal (<i>csd 1463</i>)	Court Events
Minute Order (hearing continued)	Court Events
Minute Order (hearing held)	Court Events
Miscellaneous Notice	Court Events
Motion for Adequate Protection	Motions/Application
Motion for Ex Parte Relief	Motions/Application
Motion for Joint Administration	Motions/Application
Motion for More Definite Statement	Motions/Application
Motion for Relief From Stay (fee)	Motions/Application
Motion for Summary Judgment	Motions/Application
Motion to Appoint	Motions/Application
Motion to Appoint Trustee	Motions/Application
Motion to Assume	Motions/Application
Motion to Avoid Lien	Motions/Application
Motion to Borrow	Motions/Application

(M)

Motion to Compel	Motions/Application
Motion to Consolidate	Motions/Application
Motion to Convert Case	Motions/Application
Motion to Deposit Funds	Motions/Application
Motion to Dismiss Case	Motions/Application
Motion to Extend Time	Motions/Application
Motion to Intervene	Motions/Application
Motion to Limit Notice	Motions/Application
Motion to Reconsider	Motions/Application
Motion to Reopen Case (fee)	Motions/Application
Motion to Seal	Motions/Application
Motion to Sell Free & Clear of Liens	Motions/Application
Motion to Vacate	Motions/Application
Motion to Waive Appearance at 341(a) Meeting	Motions/Application
Motion to Withdrawal Document	Motions/Application
Motion to Withdraw as Attorney	Motions/Application
Motion to Withdrawal Reference (fee)	Motions/Application

(N)

Notice ~Generic~	Other
Notice of Assignment of Claim and Pending Subrogation and Order Thereon (<i>csd 1404</i>)	Court Events
Notice of Appeal ⁴	Appeal
Notice of Automatic Stay	Notices
Notice of Change in Assigned Judge & Case Number	Notices

(N)

Notice of Change in Date Fixed for Trial/Hearing (<i>csd 1188</i>)	Court Events
Notice of Change of Address (<i>csd 1547</i>)	Notices
Notice to Creditors	Court Events
Notice of Dismissal	Court Events
Notice of Entry (of Judgment or Orders	Notices
Notice of Entry (of Judgement or Order) (<i>csd 1190 & 3050</i>)	Court Events
Notice of Entry of Order Denying the Discharge of Debtor(s)	Court Events
Notice of Entry of Order Vacating Dismissal of Case	Court Events
Notice of Entry of Order Vacating the Discharge of Debtor(s)	Court Events
Notice of Filing of a Motion for Relief From Stay	Notices
Notice of Filing of Case on Transfer From Another District	Court Events
Notice of Filing Proof of Claim by Debtor (or Trustee) (<i>csd 1403</i>)	Court Events
Notice of Hearing on Agreement to Reaffirm Debt (<i>csd 1231</i>)	Notices
Notice of Intended Action & Opportunity for Hearing	Trustee/US Trustee
Notice of Intent to Distribute Estate	Trustee/US Trustee
Notice of Lodgment of Order	Notices
Notice of Motion (<i>csd 1182</i>)	Notices
Notice of Motion and Hearing (<i>csd 1181 & 3015</i>)	Notices
Notice of Proposed Auction	Court Events
Notice of Proposed Order Re: Contempt/Sanctions & Proposed Findings of Facts (<i>csd 1191</i>)	Court Events
Notice of Public Sale	Court Events
Notice of Recession of Reaffirmation Agreement	Notices
Notice of Reference of case to US District Court	Court Events
Notice of Referral of Appeal Bap	Court Events

(N)

Notice of Settlement Conference	Court Events
Notice of Status Conference on Involuntary Petition and Answer (<i>csd 1120</i>)	Court Events
Notice of Transfer or Remand of Proceedings (<i>csd 1201</i>)	Court Events
Notice of Trial (<i>csd 1187</i>)	Court Events
Notice of Withdrawal of Document	Notices
Notice of Withdrawal of Proof of Claim and Deadline to Object to Proposed Withdrawal (<i>csd 1407</i>)	Court Events
Notification to Disregard Prior Notice	Court Events
Notice to Take Deposition	Notices
Notice RE: aka/dba Names	Court Events
Notice Regarding Return of Sealed Document(s) (<i>csd 1462</i>)	Court Events

(O)

Objection to Claims	Claim Actions
Objection to Claim and Notice Thereof (<i>csd 2015</i>)	Claim Actions
Objection to Debtor's Claim of Exemptions Combined with Notice of Hearing (<i>csd 1140</i>)	Claim Actions
Objection to Referral to the BAP	Appeal
Order ~Generic~	Orders/Opinions (Other Orders)
Order Appointing Mediator	Orders/Opinion (Other Orders)
Order and Supplement to Final Report & Account by Trustee	Orders/Opinions (Other Orders)
Order Confirming Sale	Orders/Opinions (Other Orders)

(O)

Order Directing Debtor to File Schedules & Statements (<i>csd 1126</i>)	Orders/Opinions (Other Orders)
Order Dismissing Case	Order/Opinions (Other Orders)
Order Dismissing Case For Failure to File Schedule & Statements	Orders/Opinions (Other Orders)
Order Dismissing Case For Failure to Pay Filing Fees	Orders/Opinions (Other Orders)
Order Dismissing Case Without Prejudice for Failure to File Original Decl.. Re: ECF (<i>csd 1802</i>)	Orders/Opinions (Other Orders)
Order Fixing Date to File Proof of Claims & Notice Thereof	Court Events
Order for Relief	Orders/Opinions (Other Orders)
Order for Relief and Order Directing Debtor to File Schedules & Statement (<i>csd 1127</i>)	Orders/Opinions (Other Orders)
Order for Preliminary Injunction	Orders/Opinions (Other Orders)
Order Referring Case for All Further Proceedings	Orders/Opinions (Other Orders)
Order Setting Last Day to File Claims	Orders/Opinions (Other Orders)
Order to Show Cause	Orders/Opinions (Other Orders)
Order Transferring Venue	Orders/Opinions (Other Orders)
Order Vacating an Order	Orders/Opinions (Other Orders)
Order to Show Cause	Orders/Opinions (Other Orders)
Opposition	Answer/Response

(P)

Proof of Service	Other
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(R)

Reaffirmation Agreement (<i>csd 1229</i>)	Other
Request for Miscellaneous Notice (Only Supervisor Use)	Court Events
Request for Notice RE: aka/dba Names	Court Events
Request for Notice of Entry of Order Denying the Discharge of Debtor(s)	Court Events
Request for Notice of Entry of Order Vacating Dismissal of Case	Court Events
Request for Notice of Filing of Case on Transfer from Another District	Court Events
Request for Notification to Disregard Prior Notice	Court Events
Request and Notice of Hearing (<i>csd 1181 & 1184</i>)	Notices
Request for Hearing on Motion for R/S (<i>csd 1186</i>)	Notices

(S)

Schedules	Other
Statement of Financial Affairs	Other
Statement of Issues on Appeal	Appeal
Stipulation	Other

(T)

Transcript	Court Events
Transmittal of Bankruptcy Matters (USDC) (<i>csd 1259</i>)	Court Events
Transmittal of Memorandum (BAP) (<i>csd 1252</i>)	Court Events
Transmittal of Record on Appeal (USDC) (<i>csd 1256</i>)	Court Events

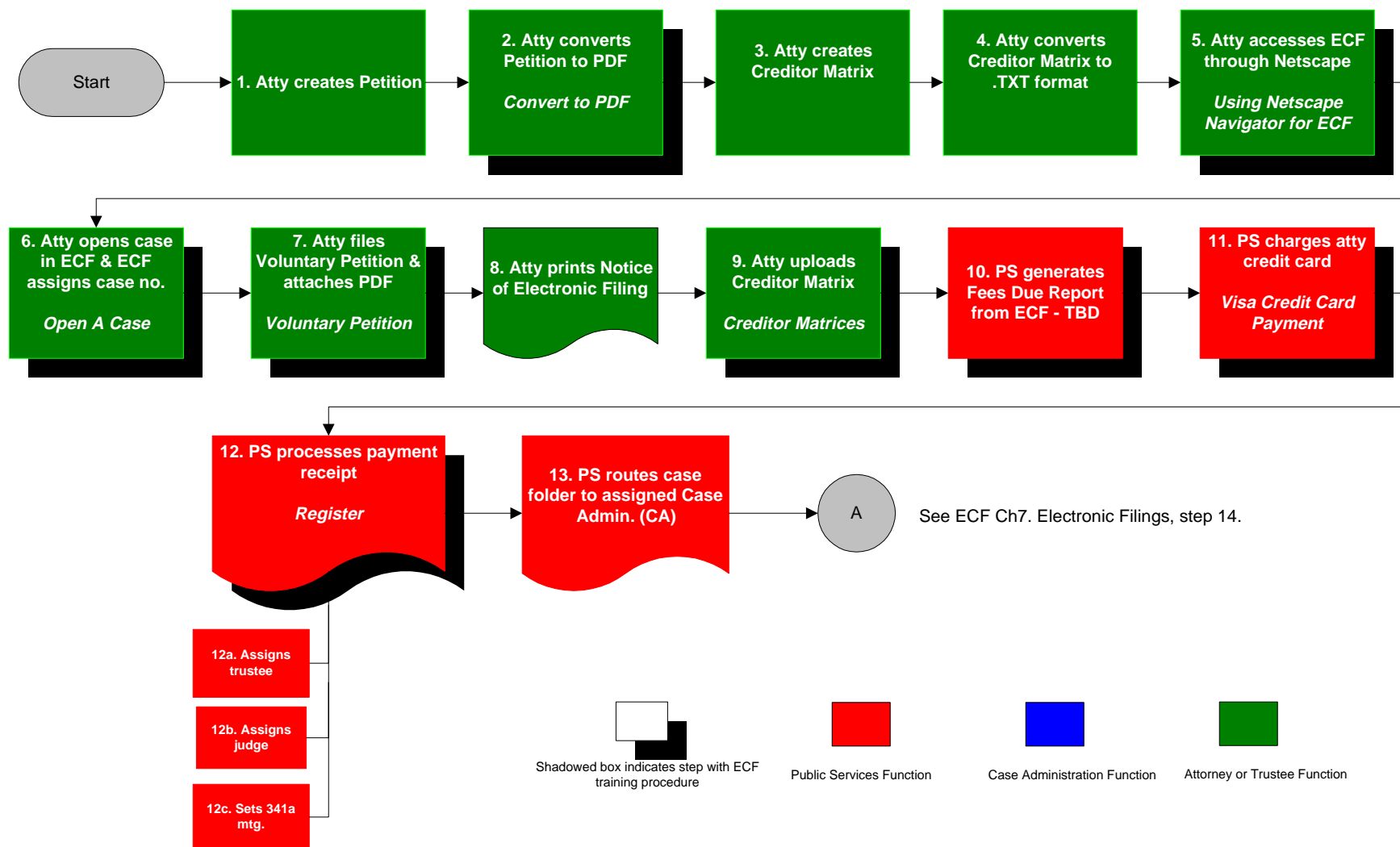
(T)

Transmittal of: (Withdrawal of Reference or Transferred Cases) (<i>csd 1202</i>)	Court Events
Trustee's Final Report & Account	Other
Trustee's Initial Report (<i>csd 2002</i>)	Other
Trustee's Rejection of Appointment	Trustee/US Trustee
Trustee's Report of Inventory	Court Events & Trustee/US Trustee
Trustee's Report of No Distribution (<i>csd 2004</i>)	Other
Trustee's Report of Sale (<i>csd 2024</i>)	Trustee/US Trustee
Trustee's Request for Notice of Proposed Abandonment	Court Events & Trustee/US Trustee
Trustee's Request for Notice of Proposed Auction	Court Events & Trustee/US Trustee
Trustee's Request for Notice of Proposed Public Sale	Court Events & Trustee/US Trustee
Trustee's Request To Set Claims Bar Date	Court Events & Trustee/US Trustee

(W)

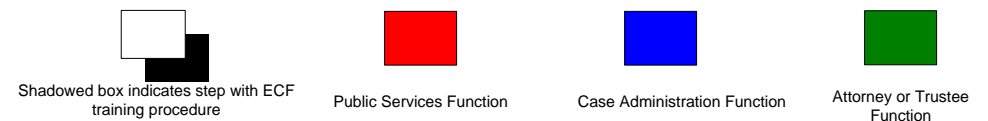
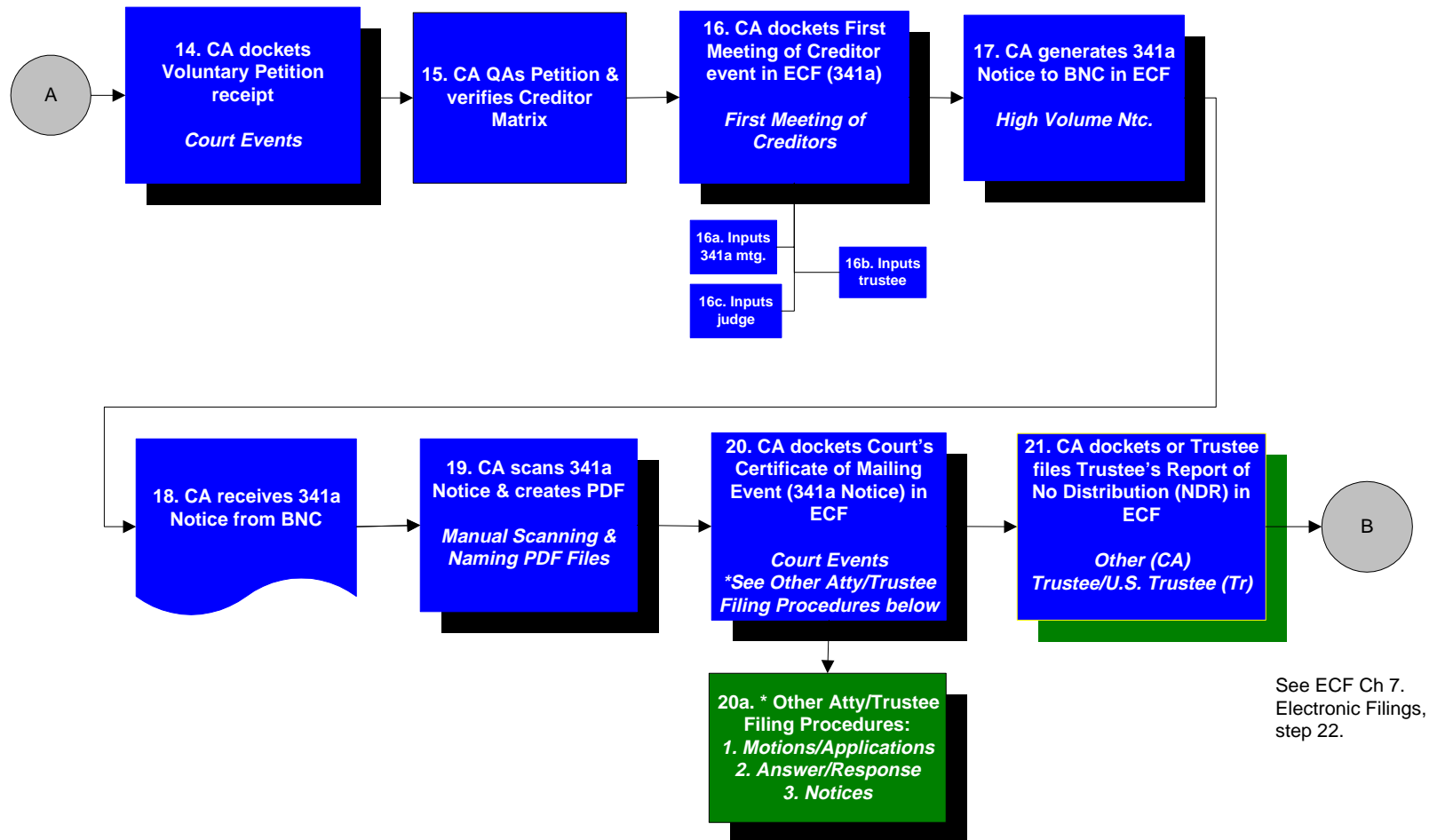
Withdrawal of Claim	Claim Actions
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ECF Chapter 7 Electronic Filings Flowchart

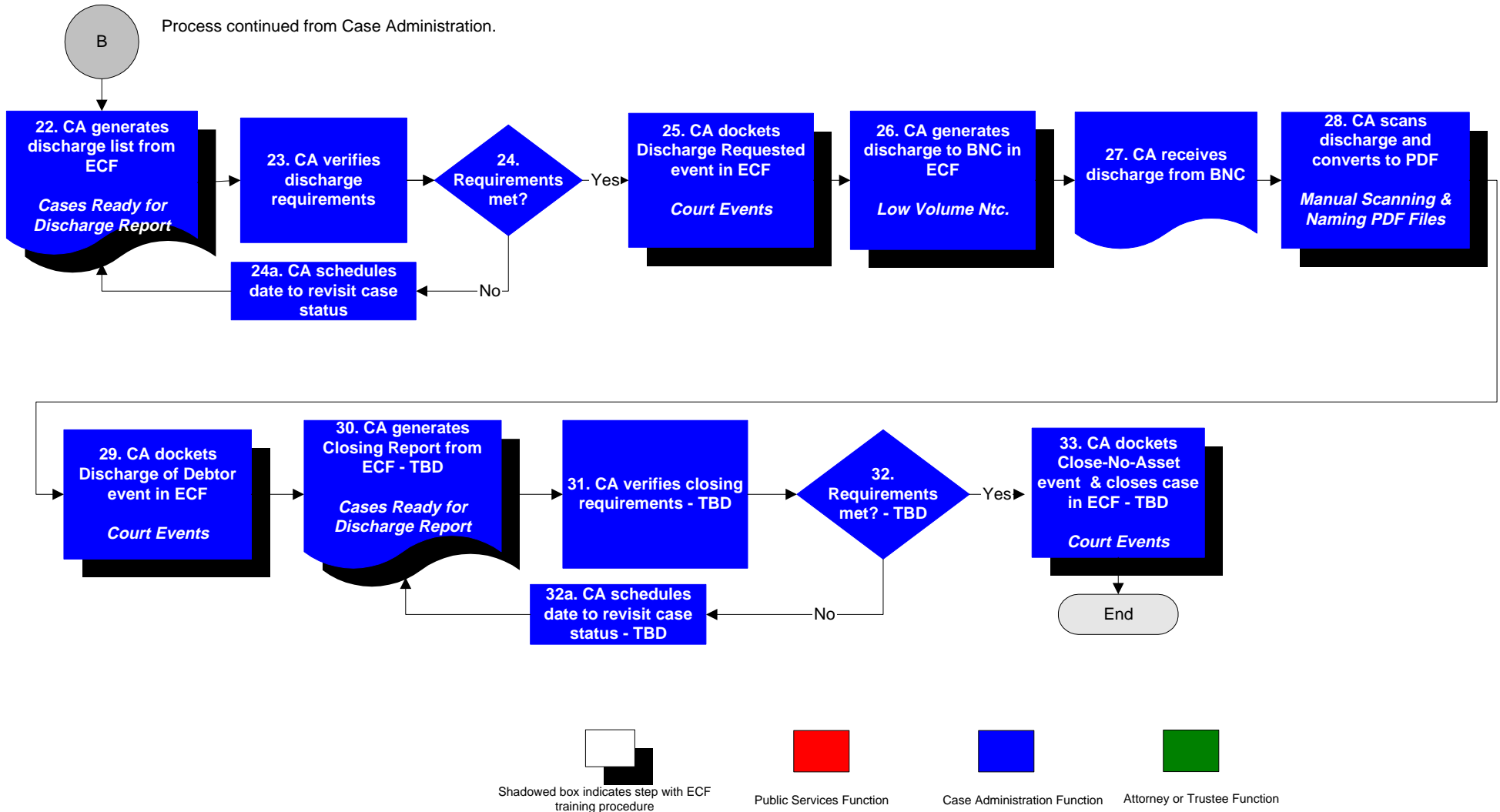


ECF Chapter 7 Electronic Filings Flowchart

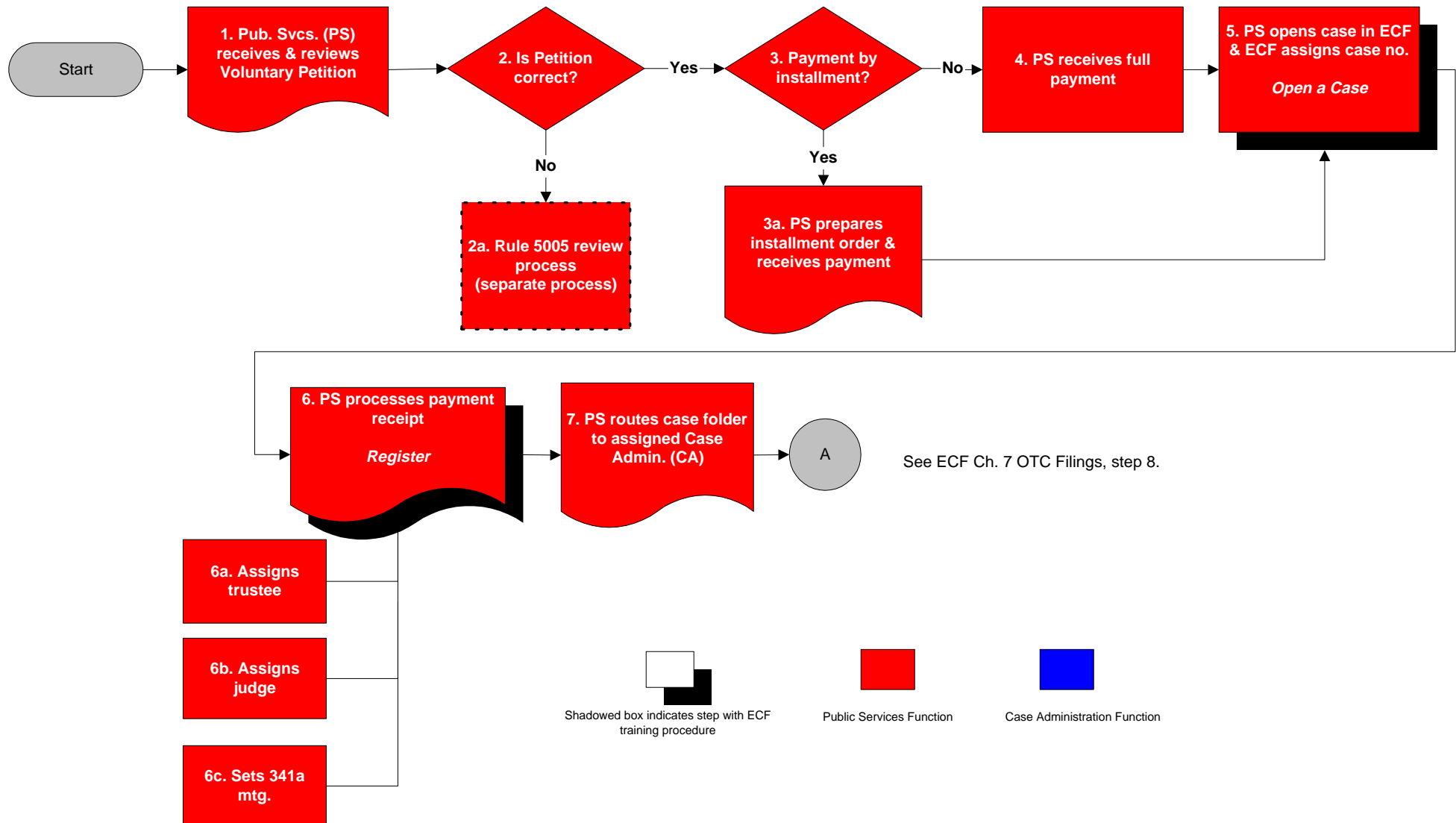
Process continued from
Public Services.



ECF Chapter 7 Electronic Filings Flowchart

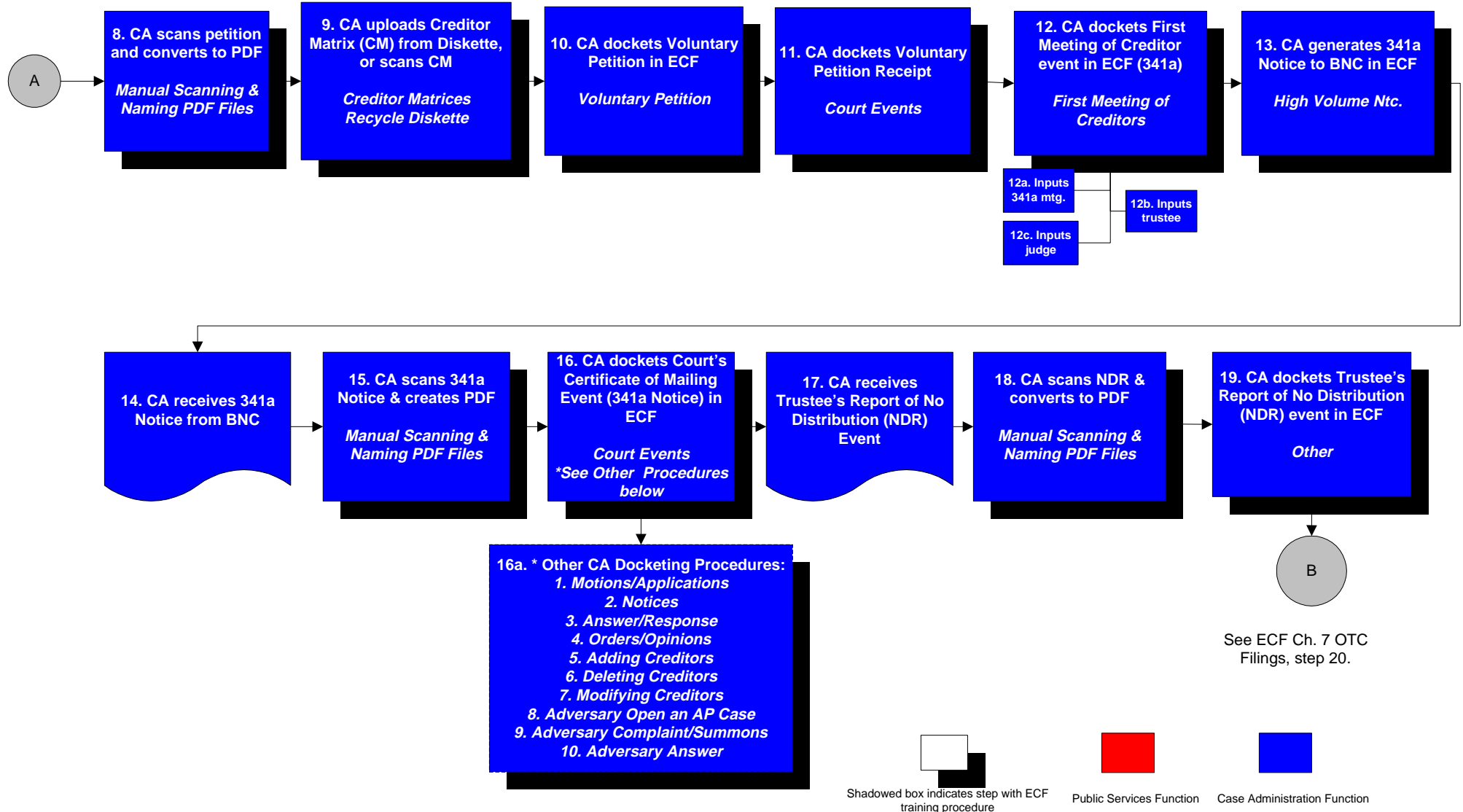


ECF Chapter 7 Over-the-Counter (OTC) Filings Flowchart

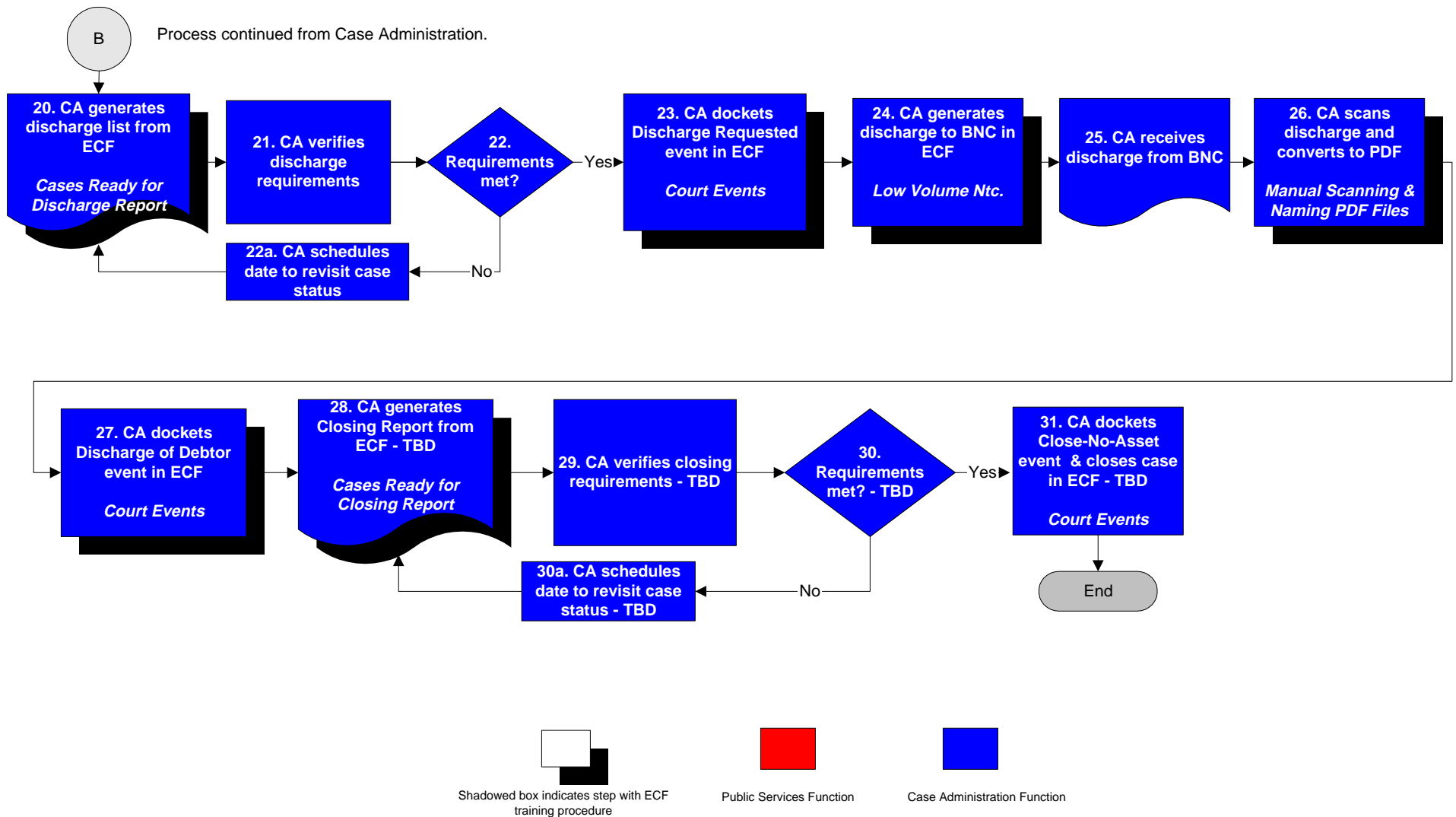


ECF Chapter 7 Over-the-Counter (OTC) Filings Flowchart

Process continued from
Public Services.



ECF Chapter 7 Over-the-Counter (OTC) Filings Flowchart



Using Netscape Navigator for Electronic Case Filing (ECF)

The following instructions will guide you in the basic use of Netscape Navigator for Electronic Case Filing (ECF). Please be aware that these instructions **are not** complete instructions for using Netscape, but they should be sufficient for accessing Netscape and for using it to get to the U. S. Bankruptcy Court - Southern District of California's ECF web site location.

This Table of Contents will show you how these instructions are structured and where to find the section that interests you.

Table of Contents

- I. Accessing Netscape Navigator
- II. Accessing the U. S. Bankruptcy Court - Southern District of California Web Site
- III. Accessing the ECF System
- IV. Logging In to the ECF System
- V. Closing ECF

I. Accessing Netscape Navigator

On your PC desktop, you will find the Netscape Navigator icon. It looks like this:

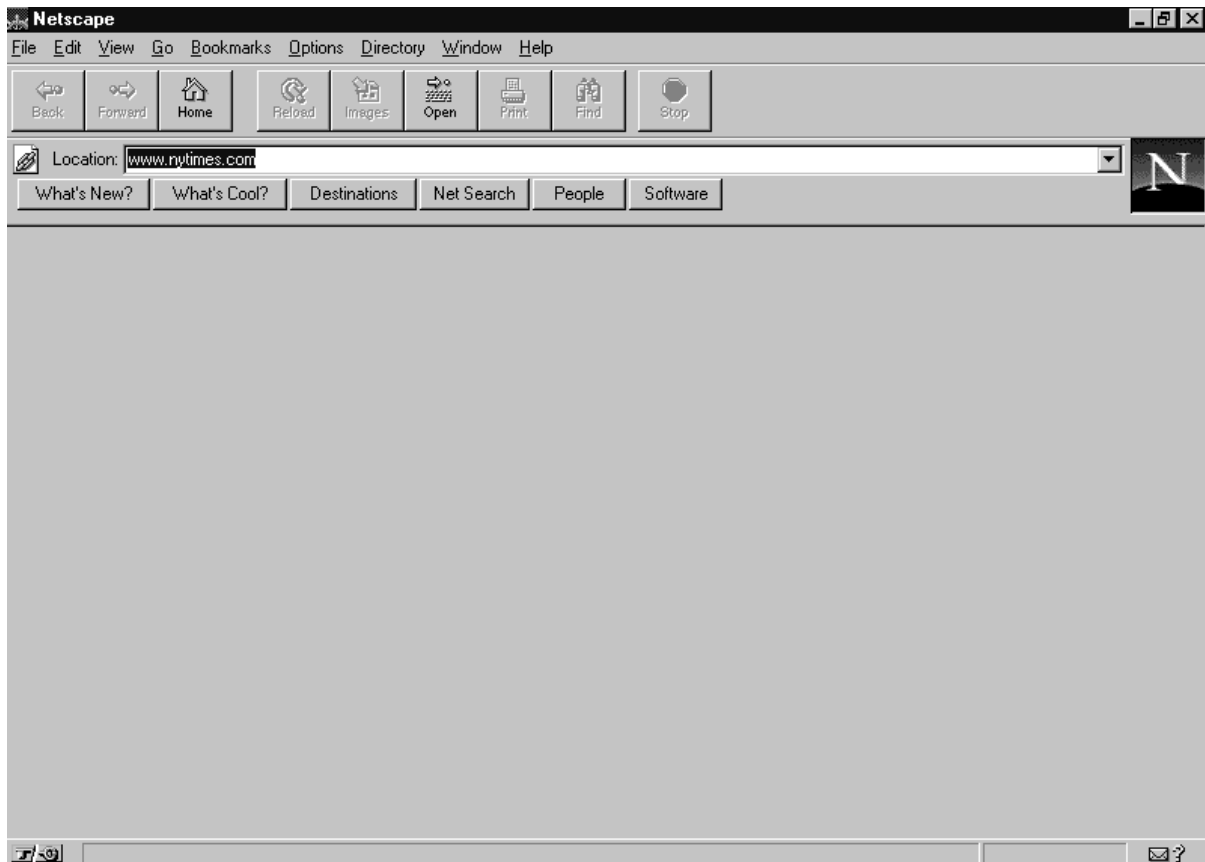


Netscape
Navigator

Access Navigator

- ▶ To access Netscape Navigator, double-click on the Netscape Navigator icon on the Windows NT desktop.
- ▶ ▶ The Netscape Navigator application opens.

The Netscape Navigator screen looks like this:



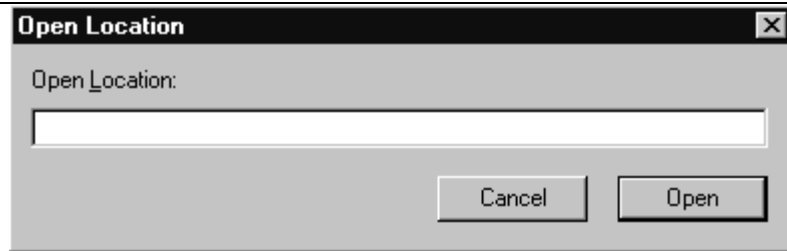
II. Accessing the U. S. Bankruptcy Court - Southern District of California Web Site

After you have accessed the Netscape Navigator program by double clicking on the Netscape icon, you must next enter the specific URL address to access the web site for U. S. Bankruptcy Court - California Southern district (USBC-CAS). This specific web site allows you access to the ECF system.

Access USBC - CAS Web Site

▶ To access the U.S. Bankruptcy Court - California Southern's web site, click on *Open* on the Netscape Navigator button bar.

▶ ▶ The *Open Location* dialog box appears. It looks like this:



▢ Type the following URL address in the *Open Location* dialog box:

<http://www.casb.uscourts.gov>

Then press <ENTER>, or click on the *Open* button.

▢▢ The U.S. Bankruptcy Court - Southern District of California's web site appears. It look like this:



Welcome to the Home Page for the Southern District of California Bankruptcy Court.

[Southern District of California - Document Filing System.](#)
[Southern District of California Bankruptcy Court - Document Filing System - Training area.](#)
[Public case information.](#)

III. Accessing the ECF System

Access ECF

To access ECF, you must use one of the hyperlinks that appear on the USBC - CAS web site. The hyperlinks appear in blue and looks like this:

[Southern District of California - Document Filing System.](#)
[Southern District of California Bankruptcy Court - Document Filing System - Training area.](#)
[Public case information.](#)

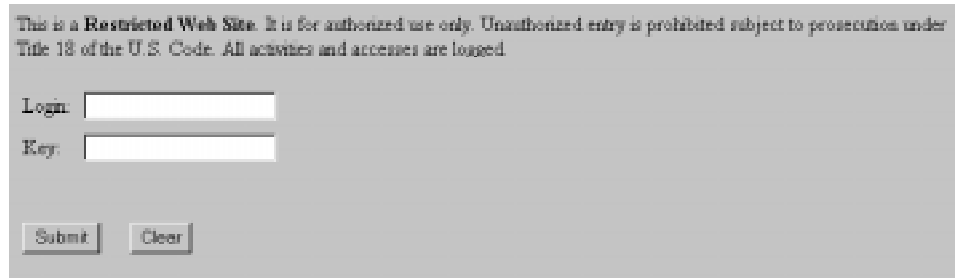
Note for Trainees: If you are being trained and wish to access ECF, you will select the hyperlink *Southern District of California Bankruptcy Court - Document Filing System - Training area.*

Note for Attorneys and Trustees: If you are an attorney or trustee and wish to access ECF, you will select the hyperlink [Southern District of California - Document Filing System.](#)

▣ To access ECF, select the appropriate hyperlink and double-click on it.

▣▣ The ECF log-in screen appears. (*Note:* It is the same for both the training hyperlink and the attorney/trustee hyperlink.)

The ECF log-in screen looks like this:



IV. Logging In to the ECF System

Logging In to ECF

To access ECF, you must provide your assigned log-in identification number and password.

Important Note: The assigned log-in identification numbers and passwords are specific for each ECF user group. That is, the identification numbers and passwords for use in the training ECF database area *cannot* access the attorney/trustee ECF database area, and vice versa. Separate log-in identification numbers and passwords must be used for each database area.

▣ At the ECF log-in screen, type your ECF identification in the white *Login* field. Tab down to the white *Key* field. Type your ECF password. Then click on the *Submit* button.

▣▣ The *ECF Main Menu* screen appears. It looks like this:



From the ECF Main Menu, you are now ready to work in ECF by double-clicking any of the five blue hypertext links that appear across the top of the Main Menu screen:

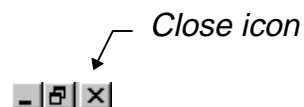


V. Closing ECF

Generally, you should stop loading any web pages before closing ECF.

Closing ECF

- ▶ To close ECF, click on the *Close* icon of the Netscape Navigator screen. It appears at the top left corner of the screen, and it looks like this:



- ▶▶ ECF closes.

Introduction

Login/password

STEP 1 To access the ECF system, click on the Netscape icon.↔



STEP 2 To access the Training Database for Electronic Court Filing, click on the hypertext link, Document Filing System.



Welcome to the Home Page for the Southern District of California Bankruptcy Court

↔ [Southern District of California Bankruptcy Court - Document Filing System](#)

STEP 3 The following login/key are necessary to advance into the ECF system.

The image shows a login screen for the ECF system. At the top, there is a red warning message: "This is a Restricted Web Site. It is for authorized use only. Unauthorized entry is prohibited subject to prosecution under Title 18 of the U.S. Code. All activities and accesses are logged." Below this message, there are two input fields. The first is labeled "Login:" and contains the text "jmwedman". The second is labeled "Key:" and contains the text "12345678". Below the input fields, there are two buttons: a green "Submit" button and a blue "Clear" button.

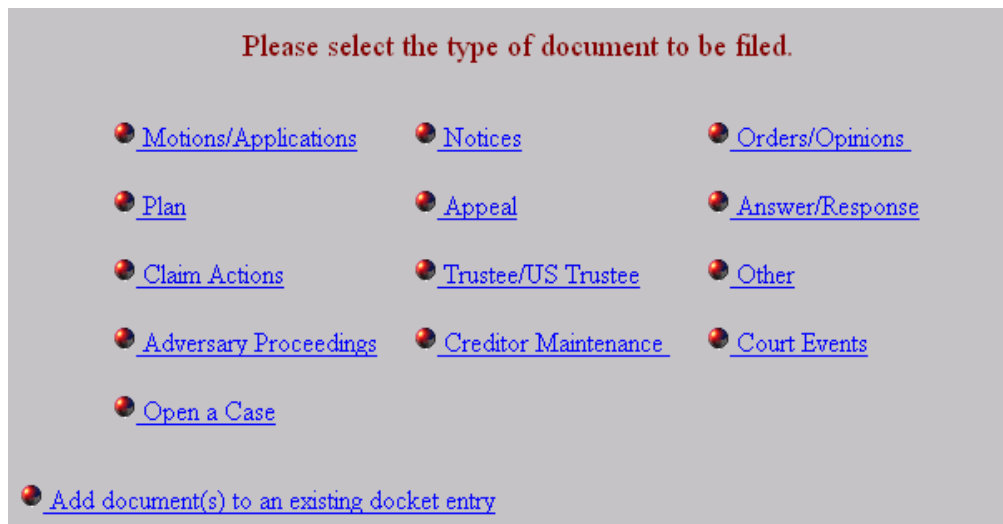
Login Screen

STEP 4

If you are filing a document in a bankruptcy case, click on [Bk Events](#).
 If you are filing a document in a an adversary case, click on [AP Events](#).

**Menu Type****STEP 5**

To docket any document related to categories below, refer to particular section of ECF manual. (e.g., for motion or application, go to Motions/Application section.)

**Main Menu**

Open a Case

Opening a Case is the starting point of putting a bankruptcy case on the ECF system. During this process you will enter the necessary information regarding the debtor and some basic statistical information. The following instruction will guide you through the Electronic Case Filing (ECF) system for opening a bankruptcy case.

STEP 1 Click on [Open a Case](#) hypertext link to docket case information.

STEP 2 The **Case Data** screen will not all you to enter a case number or the Date Filed.

The screenshot shows a web form titled "Case Data". It contains three input fields: "Docket Number:" (empty), "Office:" (a dropdown menu showing "San Diego (3)"), and "Date Filed:" (a text field showing "1/22/1998"). At the bottom of the form are two buttons: "Next" and "Clear".

Figure 1

- ◆ The San Diego Office code (3) is a default field. (See Figure 1)
- ◆ Click on the [Next] button.

STEP 3 The **Information Regarding Debtor** screen will appear. The following fields are to identify debtors case specifics and should reflect the petition cover sheet. (See Figure 2)

The screenshot shows a web form titled "Case Data" at the top. Below the title are three input fields: "Case Number:", "Office: 3", and "Date Filed: 7/31/1998". Below these fields is a section titled "INFORMATION REGARDING DEBTOR". This section contains two main areas. On the left, under "Type of Debtor", there are six checkboxes: "Individual" (checked), "Railroad", "Corporation", "Stockbroker", "Partnership", and "Commodity Broker", and "Other". On the right, there are six input fields: "Joint Petition:" (dropdown showing "n"), "Chapter:" (dropdown showing "7"), "Fee Status:" (dropdown showing "cc"), "Nature of Debt:" (dropdown showing "consumer"), "Voluntary:" (dropdown showing "voluntary"), and "Reopened:" (dropdown showing an empty field). At the bottom of the form are two buttons: "Next" and "Clear".

Figure 2

- ◆ To select **Type of Debtor** click inside appropriate box to insert a check mark. (i.e. if debtor is not a business select **Individual**.)
- ◆ If the debtor filing has a joint debtor, click on the ▼ arrow to the right of **Joint Petition** field and select **y** (yes).
- ◆ The **Chapter** field will default to 7.
- ◆ The **Fee Status** field will default to (cc) for credit card. If the fees are received in installments or paid in full, click on the ▼ arrow to the right of Fee Status field and select (i) for installments or (p) for paid.
- ◆ The **Nature of Debt** field will default to consumer. If the debtor is a business, click on the ▼ arrow to the right of the nature of debt and select (business).
- ◆ If debtor is filing as a business, click on the ▼ arrow to the right of **Type of Business** and select business type.
- ◆ The **Voluntary** field will default to voluntary.
- ◆ Click on the [Next] button to continue.

STEP 4 The **Statistical/Administration Information** screen will appear. The following fields will allow you to enter the debtor's asset status. All chapter seven cases begin as a no asset case. For the next three fields, use the petition cover sheet to adjust fields appropriately. (See Figure 3)

The screenshot shows a software interface for case data entry. At the top, under 'Case Data', there are three fields: 'Docket Number:', 'Office: 3', and 'Date Filed: 1/22/1998'. Below this is a section titled 'STATISTICAL/ADMINISTRATION INFORMATION'. It contains four rows of fields: 'Asset Notice:' with a dropdown menu showing 'no'; 'Estimated Number of Creditors:' with a dropdown menu showing '2 (16-49)'; 'Estimated Assets:' with a dropdown menu showing '3 (\$100,000-\$499,999)'; and 'Estimated Liabilities:' with a dropdown menu showing '3 (\$100,000-\$499,999)'. At the bottom of the form are two buttons: 'Next' and 'Clear'.

Figure 3

- ◆ The **Asset Notice** field will default to *No* for chapter 7's. (No asset cases)
- ◆ The **Estimated Number of Creditors** field defaults to 1, click inside the box to modify number (1 through 6).
- ◆ The **Estimated Assets** field defaults to 1, click inside the box to modify number (1 through 8).
- ◆ The **Estimated Liabilities** field defaults to 1, click inside the box to modify number (1 through 8).
- ◆ Click on the [Next] button to continue.

STEP 5 The **Add Party** screen will appear. (See Figure 4)

Associate a party with the case
Enter at least the first letter of the last name of the **Party** and press the **Search** Button.
Select Party whose last name starts with:
[End Party Selection](#)

Figure 4

- Enter at least the first letter of the last name of Party and click on the **[Search]** button. Use a capital letter. (See **Figure 4**)
- If the party you're searching for appears, click on it. The debtor's address will appear to the right, verify address and SSN. (See **Figure 5**) Verify that the **party role** is *Debtor (db:pty)*. If debtor does not have an attorney, select the ▼ arrow to the right of **ProSe:** and select yes. Click on the **[Next]** button and proceed to **Step 5D**.
- If you can not find the Party in the system, click on the **[Create New Party]** button to advance to New Person Information screen, then proceed to **Step 6**. (See **Figure 5**)

*Note: If the **[Create New Party]** button does not show, use your scroll bar to the right, to advance screen.*

Reynolds, Auben
Reynolds, Burt
Reynolds, Burt
Reynolds, Russ
Reynolds, Russ again

Select the party role in this flag: ProSe:

Party Test:

If you can not find the Party in the system, click on "Create New Party"

Burt Reynolds
SSN: 849-90-44
1856 La Jolla Village Dr.
La Jolla CA 92117-06073 06073

Figure 5

- The **Modify Address** screen will appear. (See **Figure 6**)

Burt Reynolds(SSN# 849-90-4422)

Office:

Address 1: 1856 La Jolla Village Dr.

Address 2:

Address 3:

City: La Jolla State: CA

Zip: 92117 Country:

Phone:

Figure 6

- ◆ The screen will appear every time you select a debtor that has previously filed a petition.
- ◆ If the address is incorrect, click inside necessary fields to make corrections.
- ◆ Click on the **[Submit]** button to continue, then proceed to **Step 8**.

STEP 6 The **New Person Information** screen will appear. This screen is designed to accomodate all possible needs of a new person being add to the case. (See **Figure 7**)

New Person Information	
Last Name	<input type="text"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Generation	<input type="text"/>
Title	<input type="text"/>
SSN	<input type="text"/>
Tax ID	<input type="text"/>
Office	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Country	<input type="text"/>
County	San Diego
Phone	<input type="text"/>
ProSe	no
Party Text	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Clear"/>	

Figure 7

- ◆ Click inside the **Last Name** field to type in debtors name. Use your tab key to advance to next field.
- ◆ Verify that the Role of new person being added is *debtor*.
- ◆ Depending on the debtors information, you may skip the following fields if not applicable. (*Middle Name, Generation, Title, Tax ID, Office and Country*)
- ◆ If debtor does not have an attorney, select the ▼ arrow to the right of Pro Se and select yes. Click on the **[Submit]** button to continue.

STEP 7 Press the **[Continue]** button to proceed with the processing of selected debtor.

STEP 8 The **Create Alias** screen will appear. (See **Figure 8**)

Create an alias for Reynolds, Burt (3083)

Enter at least the first letter of the last name of the Alias and press the Search Button.

Select Alias whose last name starts with:

[End Alias Selection](#)

Figure 8

- ◆ If the debtor has no alias listed, click on the hypertext link [End Alias Selection](#), then proceed to **Step 13**.
- ◆ Enter at least the first letter of the last name of the Alias and click on the **[Search]** button.

- ◆ If you can not find the Alias in the system, click on the **[Create New Alias]** button. (See **Figure 9**).

Figure 9

STEP 9 The **New Alias Information** screen will appear. (See **Figure 10**)

Figure 10

- ◆ Enter debtor's alias in the fields provided.
- ◆ The default for the role of debtor's alias is aka (**Also Known As**). Click on the ▼ arrow to select appropriate. Role. (i.e., **Doing Business As (dba)**, **Formerly Doing Business As (fdba)**, **Formerly Known As (fka)**, etc.)
- ◆ Click on the **[Submit]** button. Repeat process until all alias' have been added.

STEP 10 Click on the **[Continue]** button to continue processing the added alias.

STEP 11 To add the joint debtor to the system, repeat **Steps 5-9**.

STEP 12 If you have no more Alias' to add, click on the hypertext link [End Alias Selection](#).

STEP 13 The case number will appear stating the case has been opened. To docket the Voluntary Petition, click on [Docket Lead Event?](#) (See **Figure 11**)

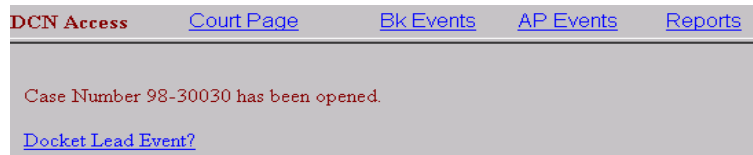


Figure 11

Note: ECF cases will begin with the number 3 following the year. (i.e., 98-30030)

**TO CONTINUE, FOLLOW JOB AID FOR VOLUNTARY PETITION.
Beginning with Step 2.**

How to Convert to PDF

Voluntary Petition (Bankruptcy 2000)

Converting a voluntary petition to Portable Document Format (PDF) will assist you when attaching your document when using the Electronic Case Filing (ECF) system.

STEP 1 To access petition software, click on the BK2000 icon. →
(See Figure 1)



Figure 1

STEP 2 Enter all necessary information for petitioning debtor(s).

STEP 3 Click on **Preview** from the Bankruptcy 2000 menu bar. (See Figure 2)
◆ Click on *Form 1. Voluntary Petition* from the drop down menu to view the Voluntary Petition.

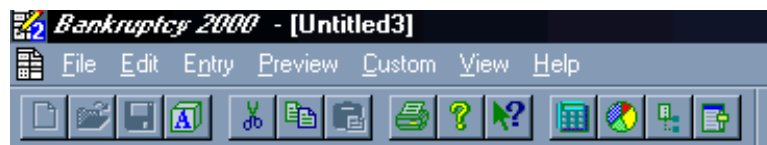


Figure 2

STEP 4 The **Petition** cover page will appear. (See Figure 3)
◆ Review Petition information before converting to a pdf file.

Figure 4

STEP 5 Click on **File** from the Bankruptcy 2000 menu bar to select the **Print** option.

- ◆ The **Select Forms to Print** screen will appear. (See Figure 2)
- ◆ Click on the box to the left of *Chapter 7* under Print full.
- ◆ Click on the **[Print]** button to continue.

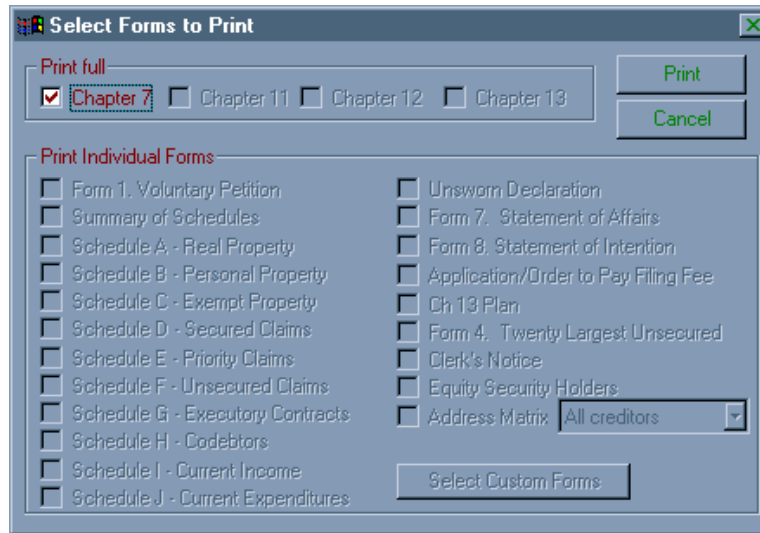


Figure 5

STEP 6 The **Print Dialog Box** will appear. (See Figure 6)

- ◆ Click on the ▼ arrow to the right of the *Name:* field.
- ◆ Click on **Acrobat PDFWriter** to convert the petition to a *pdf* file.
- ◆ Click on the **[OK]** button to continue.

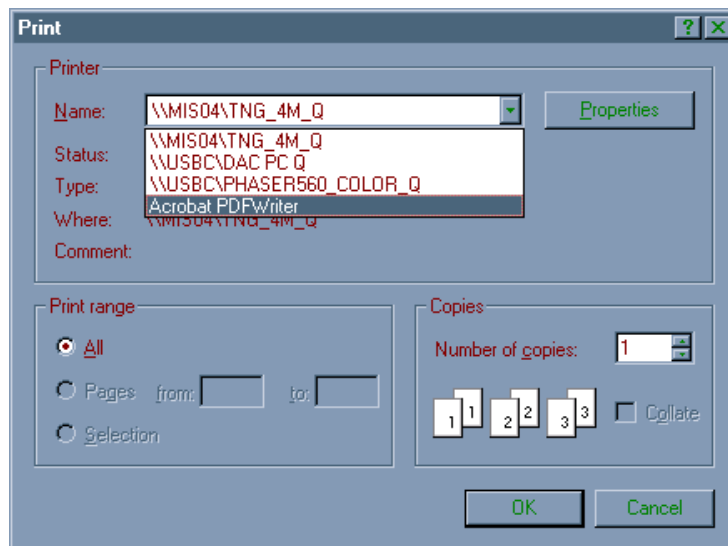


Figure 6

STEP 7 The **Save PDF File As** screen will appear. (See Figure 7)

- ◆ Rename the *File Name*: (i.e., volp1.pdf)
- ◆ Click on the **[OK]** button to continue.

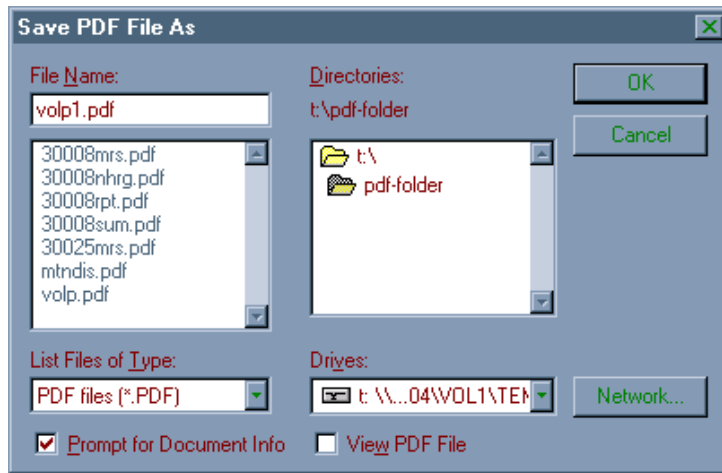
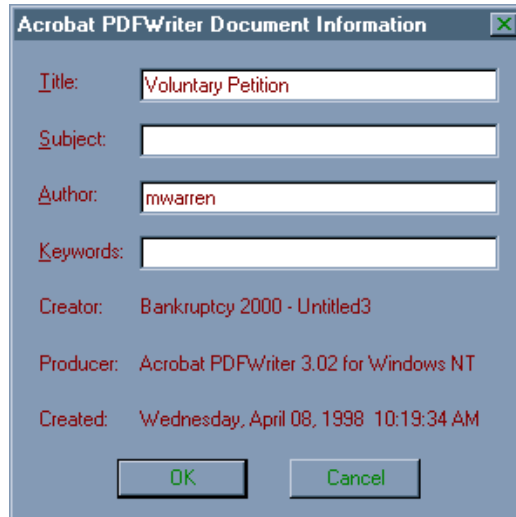


Figure 7

STEP 8 The **Abrobat PDFWriter Document Information** screen will appear. (See Figure 8)

- ◆ Enter the name of the document being filed. (i.e., *Voluntary Petition*)
- ◆ Click on the ▼ arrow to the right of the *Drivers*: field to select designated drive for *pdf* files.
- ◆ Click on the **[OK]** button to continue.



The file is now an Adobe PDF file under the newly assigned name, and the original document remains in its original form under the original name.

How to Convert Documents to a PDF File

Conversion of any word processing document to a Portable Document Format (PDF) is required before submission to the court's electronic case filing system. The process can be accomplished in one of two ways depending on the word processing program you are using.

For WordPerfect:

- STEP 1** Open the document to be converted.
- STEP 2** Click on the **File** drop down menu to select the **Print** option. The print dialog box will appear.
- ◆ Select the option to change the selected printer. A drop-down window menu with a list of printer choices is displayed.
- STEP 3** Select **Adobe PDF Writer 3.x**.
- STEP 4** Click on the [**Print**] button in the dialog box. The file will not actually print out; instead the option to save the file as a PDF will appear.
- STEP 5** Name the file, using the naming convention. (See attached) The (.pdf) extension will automatically be added.
- STEP 6** Accept the option by clicking on the [**OK**] button. The file is converted to a PDF document.

Note: Depending on the word processing being used, it may be necessary to find the printer selection option elsewhere. At that point, change the printer to Adobe PDF Writer.3.x, and following the instructions above.

For Microsoft Word 95 or Later:

- STEP 1** Open the document to be converted.
- STEP 2** Click on the **File** drop down menu to select **Create Adobe PDF**.
- STEP 3** Name the file, using the naming convention. (See attached) The (.pdf) extension will automatically be added.

The file is now an Adobe PDF file under the newly assigned name, and the original document remains in its original form under the original name.

To create a file name:

- A. Use the case number on the pleading, do not include year: Example - 10001, 12345, 06976, etc. (Use all five digits of case number.)
- B. Identify the pleading: Example - motion, order, voluntary petition, etc. Use letters from the document name, example - **m**otion, **o**rders, **v**oluntary **p**etition, **t**rustee **r**ejection, etc.
- C. Combine A and B to create the file name: Example - 10001m, 12345o, 06976vp, etc.

NOTE: *If you have more than one of the same type of pleading for the same case, process A - C, but add a number to identify the first, second, third, etc. Example - 10001m1, 10001m2, 10001m3, etc.

*If a pleading is not listed on the **Naming Pdf Files List** (see below), create a PDF filename by processing A - C.

ECF Dictionary:

Naming PDF Files List

Applications a
Notices n

Motions m
Orders o

Other
Certificate of Service cs
Certificate of Mailing cm
Petition vp
Adversary ad
Summons sm
Interrogatories int
Reaffirmation Agreement ra
Schedules sc
Stipulation stp
Objection to Claim oc
Acknowledgment of
Transfer at
Withdrawal of Claim wc
Disclosure Statement ds
Exhibit ex
Amendments as
Notice to Creditors nc

Answer/Response
Answer to Invol. Petition aip
Declaration dc
Memorandum of Points
And Authorities pa
Opposition/Objection op
Response/Reply r

Trustee/U.S. Trustee
Notice of Intent to Dist. nid
Order and Supplement
To Final Rpt and Acct ofr
Final Report and Account fra
Trustee's Rejection trj
Report of Sale sr

Appeal
Counter Designation cd Notice of Appeal nap
Designation of Content dc Statement of Issues
District Court Rule 9 on Appeal sia
Statement dcr Transcript ts
Memorandum of BAP bap Transmission of Record
Motion to Leave to of Appeal tra
Appeal mla

Voluntary Petition

The Voluntary Petition is the beginning of a bankruptcy. The following instruction will guide you through the Electronic Case Filing (ECF) system for docketing the voluntary petition.

STEP 1 Click on [Other](#) hypertext link from the ECF main menu.

STEP 2 The **Case Number** screen will appear. (See Figure 1)

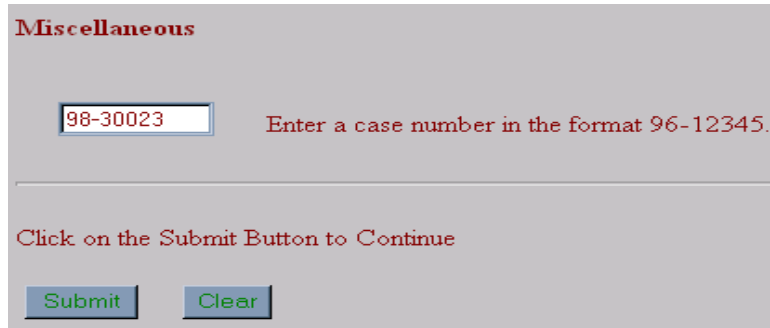
The screenshot shows a web form titled "Miscellaneous" in red. It contains a text input field with the value "98-30023". To the right of the field is the instruction "Enter a case number in the format 96-12345." in red. Below the field is a horizontal line, followed by the text "Click on the Submit Button to Continue" in red. At the bottom are two buttons: "Submit" and "Clear", both with green text on a grey background.

Figure 1

- ◆ Enter a case number, and click on the [**Submit**] button to continue.
- ◆ If the computer prompts that you entered an invalid case number, click on [Back](#) hypertext link to re-enter the case number.

STEP 3 The **Case Verification** screen will appear. (See Figure 2)

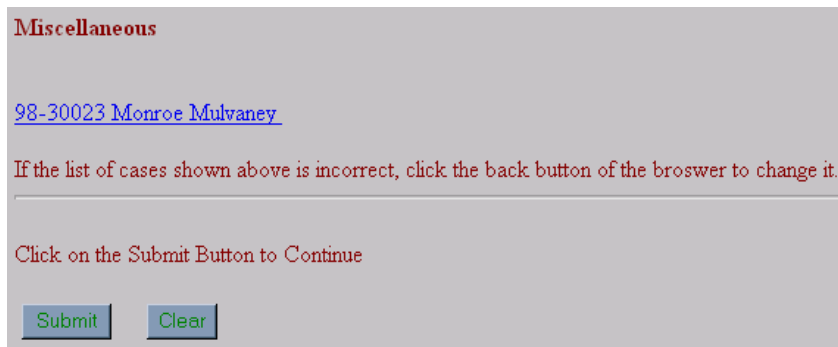
The screenshot shows a web form titled "Miscellaneous" in red. It displays the case number and name as a blue hyperlink: "[98-30023 Monroe Mulvaney](#)". Below this is the instruction "If the list of cases shown above is incorrect, click the back button of the browser to change it." in red. A horizontal line separates this from the text "Click on the Submit Button to Continue" in red. At the bottom are two buttons: "Submit" and "Clear", both with green text on a grey background.

Figure 2

- ◆ Verify the case number and case name.
- ◆ If case number and name do not match, click on the Netscape **Back** button to re-enter the case number.
- ◆ Click on the [**Submit**] button to continue.

STEP 4 The **Party Filer** screen will appear. (See **Figure 3**)

Miscellaneous

Select from the following list the party for whom you are filing this document.

Mulvaney, Monroe [pty:db] (2930)

Select (above) or add (Add/create new party link) the person.

[Add/create new party](#)

Click on the Submit Button to Continue

Submit Clear

Figure 3

- ◆ Select the party the attorney represents, then click on the **[Submit]** button to continue.
- ◆ If more than one debtor, press and hold the ctrl key, then click on the appropriate debtor(s).

STEP 5 The **Event Type** screen will appear. (See **Figure 4**)

Miscellaneous

Select the type of document(s) being filed.

Balance of Schedules and/or Chapter 13 Plan
Brief
Certificate of Mailing
Certificate of Service
Chapter 7 Voluntary Petition
Chapter 7 Voluntary Petition, Schedules or Statements Due
Chapter 7 Voluntary Petition, all schedules & statements
Clerk's Entry of Default

Click on the Submit Button to Continue

Submit Clear

Figure 4

- ◆ Verify the Voluntary Petition to determine which event is appropriate.
 - Chapter 7 Voluntary Petition (fee) *bare bones*
 - Chapter 7 Voluntary Petition, Schedules or Statements Due (fee)
 - Chapter 7 Voluntary Petition, all schedules & statements (fee)
- ◆ Click on the **[Submit]** button to continue.

STEP 6 The **Pdf Attachment** screen will appear. (See Figure 5)

Miscellaneous

☒ Last Document (clear this check box if you have attachments to submit with this transaction).

Select the **pdf** filename of the document you are filing.

Please view the PDF document before you submit it. This ensures that you are filing the correct document and that the PDF conversion process worked properly.

T:\pdf\CSD1163.pdf

Figure 5

- ◆ If there are supporting documents, click on the box next to the words **Last Document**, to remove check mark.
- ◆ Select the *pdf* filename of the document you are filing by using the following methods:
 1. Enter the full filename of the document to be filed in the text box; or
 2. Click on the **[Browse...]** button to navigate to the appropriate directory and file to select the document.
 - a. Click on ▼ arrow to the right of Look in: to select **Temp on 'Mis05\vol1' (T:)**. Use scroll bar
 - b. Double click on folder titled **pdf**. (Use scroll bar.)
 - c. Click on ▼ arrow to the right of Files of type: to select **Acrobat (*.pdf)**.
 - d. Highlight the PDF file with one right click of the mouse.
 - e. Select **open** on the menu with right click; to brings up the document for viewing and verification.
 - f. Close document with clicking on **"X"** in the upper right-hand corner.
 - g. Click on the **[Open]** button to insert the filename in the text box.
 - h. Click on the **[Submit]** button, If there are no supporting documents, proceed to **Step 8**.

STEP 7 The **Attachment** screen will appear. (See Figure 6)

Miscellaneous
Collecting document # 2

Type of attachment	Description
Proof of Service	of Petition

☒ Last Document (clear this check box if you have attachments to submit with this transaction).

Select the pdf filename of the document you are filing.

Please view the PDF document before you submit it. This ensures that you are filing the correct document and that the PDF conversion process worked properly.

T:\pdf\CSD1180.pdf

Figure 6

- ◆ Click on the ▼ arrow and click on the type of attachment.
- ◆ To describe the supporting document, click inside the Description box and type in description.
- ◆ For more than one supporting document, click on the box next to **Last Document** to remove the check mark.
- ◆ Type in full file name of the first supporting document, or use the **[Browse...]** button, repeat **Step 6. 2(c-h)**.
- ◆ If last attachment, click on the **[Submit]** button.

STEP 8 The **Data Element** screen will appear. (See Figure 7)

The following are additional data elements related to this docket entry; please fill them in as appropriate. If no data elements appear simply press the next button to continue with this filing.

Declaration re: ECF DueDeadline - Information

Enter Declaration due date [optional field]
4/6/1998

Click on the Submit Button to Continue

Figure 7

- ◆ The following are additional data elements related to this docket entry. Prepare Declaration re: ECF Due Deadline information. File Declaration at Courthouse.
- ◆ Click on the **[Submit]** button to continue.

STEP 9 The **Modify Text** screen will appear. (See Figure 8)

Miscellaneous

Please confirm the docket text shown below; if it is correct then press the next button (below) else you must re-create the event.

Chapter 7 Voluntary Petition, Schedules A-J & Statement of Financial Affairs. Submission of this document constitutes, if necessary, a credit card authroization.

Declaration re: ECF due by 4/6/1998, filed by Warren, Monette on behalf of Mulvney, Monroe.(Warren, Monette)

Click on the Submit Button to Continue

Figure 8

- ◆ To further define the petition, click inside free text box and enter any pertinent information.
- ◆ Click on the [**Submit**] button to continue.

STEP 10 The **Final Approval** screen will appear. (See Figure 9)

[DCN Access](#) [Court Page](#) [Bk Events](#) [AP Events](#) [Reports](#)

Miscellaneous
Final Approval

Examine the docket text shown below.
This submission is subject to review, modification or rejection by the Clerk of Court.

Chapter 7 Voluntary Petition, Schedules A-J & Statement of Financial Affairs. Submission of this document constitutes, if necessary, a credit card authroization. Declaration re: ECF due by 4/6/1998, filed by Warren, Monette on behalf of Mulvney, Monroe.(Warren, Monette)

Final Submission.


 [Submit filing to court](#)

Figure 9

- ◆ Verify Final Docket text.
- ◆ If final docket text is correct, proceed to **Step 11**.
- ◆ If final docket text is incorrect, to modify a previous screen, click on the **Back** button at the top of the Netscape screen to find the screen to be modified.
- ◆ To abort or restart the transaction, click on [Bk Events](#).

STEP 11 Click on [Submit filing to court](#).

STEP 12 Click on the **[Print]** button at the upper left-hand corner of the Netscape screen to print out the Notice of Electronic Filing.

*The **Notice of Electronic Filing** will appear each time you submit a filing to the court through the ECF System. Each notice will include the following:*

- ◆ Who filed the document:
- ◆ Date and Time:
- ◆ Case Name:
- ◆ Case Number:
- ◆ Document Number:
- ◆ Docket Text:
- ◆ Document Description:
- ◆ Original filename (*pdf*):
- ◆ Electronic document Stamp:



Notice of Electronic Filing

Upload Creditor Matrices into the ECF System

A creditor matrix contains creditor information, such as the name of the creditor and their mailing address. This information is used for noticing, and claims information, when applicable. The following instructions will guide you to upload the creditor information (.txt file) to the Electronic Case Filing (ECF) system.

STEP 1 Create the creditor matrix and save the file into a .txt file.

STEP 2 Access the ECF system using Netscape.

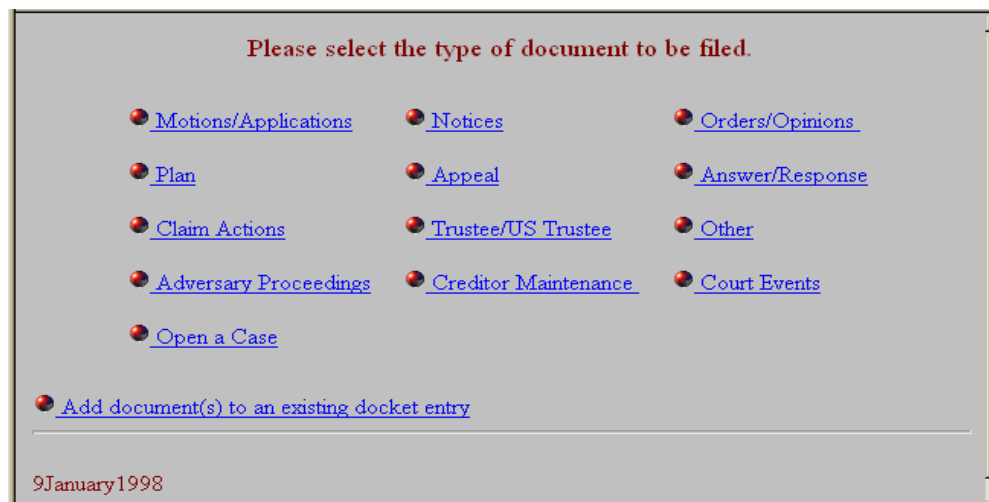
STEP 3 Click on [Bk Events](#) . (See Figure 1)

A horizontal menu bar with a light gray background. It contains several text links: "DCN Access" in red, "Court Page" in blue, "Bk Events" in blue, "AP Events" in blue, "Reports" in blue, and "Restricted" in blue. All links are underlined.

[DCN Access](#) [Court Page](#) [Bk Events](#) [AP Events](#) [Reports](#) [Restricted](#)

Figure 1

STEP 4 Click on [Creditor Maintenance](#) hypertext link from the ECF main menu to attach the creditor matrix to the related bankruptcy case. (See Figure 2)



Main Menu

Figure 2

STEP 5 The **Creditor Processing** screen will appear. (See Figure 3)

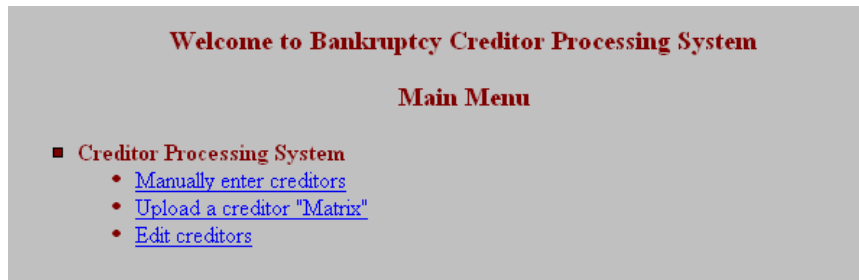


Figure 3

- ◆ Click on [Upload a creditor Matrix](#) hypertext link.

STEP 6 The **Upload a File** screen will appear. (See Figure 4)

A screenshot of a web application interface for uploading a file. The title is "Creditor Processing - Upload a File Method" in a dark red font. Below the title is a text input field containing "96-0113". To the right of the input field is a red instruction: "Enter a case number in the format 96-12345." Below the input field are two buttons: "Submit" and "Clear".

Figure 4

- ◆ Enter the case number.
- ◆ Click on the **[Submit]** button to continue.

STEP 7 The **Load Creditor Information** screen will appear. (See Figure 5)

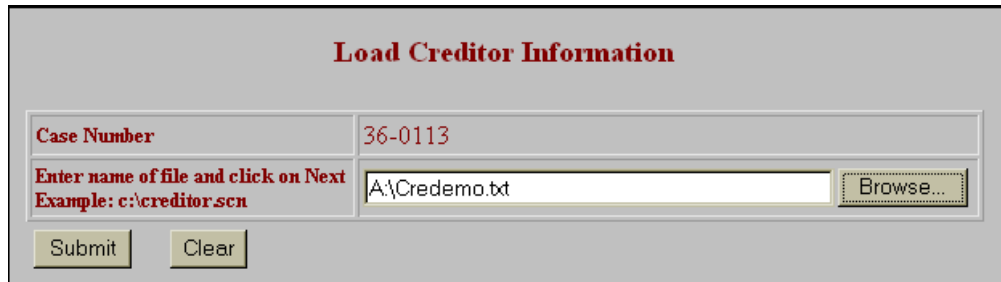


Figure 5

- ◆ Select the document filename of the creditor matrix by using one of the following methods:
 1. Enter the full filename of the creditor matrix in the space provided; or
 2. Click on the [**Browser...**] button to navigate to the appropriate directory and select the matrix (.txt).
 - a. Double click on the matrix filename.
 - b. Highlight the Text (.txt) file with one right click of the mouse button.
 - c. Select **Open** on the drop down menu with left click, for viewing and verification.
 - d. Count the creditors on the matrix for a total of creditors for comparison in **Step 8**.
 - e. Close the matrix by clicking on "X" in the upper right-hand corner.
 - f. Click on the [**Open**] button to attach the matrix to the bankruptcy case.
 - g. Click on the [**Submit**] button to continue.
- NOTE:** When opening a .txt file for the first time on your PC, select the application in which the .txt file will be read.

STEP 8 The **Total Creditors Entered** screen will appear. (See Figure 6)

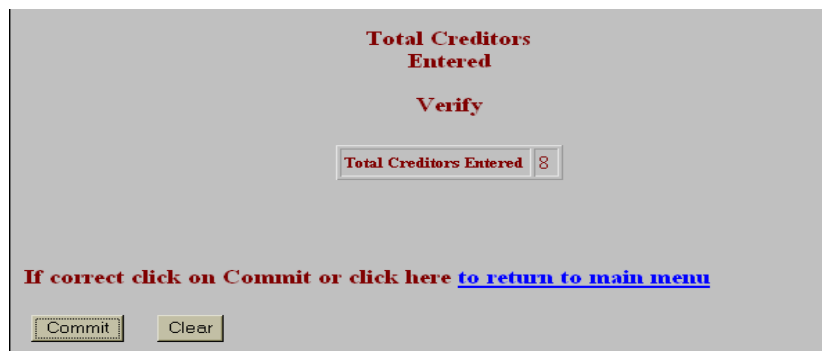


Figure 6

- ◆ Verify the creditor count information.
- ◆ If correct, Click on the [**Commit**] button. Proceed to **Step 9**.
- ◆ If incorrect, Click on [Back](#) hypertext link to return to the previous screen. (See **Figure 7**) Then, Click on [to return to main menu](#) hypertext link. This will return you to **Step 3**. (Example: creditors on wrong case number.)



Figure 7

STEP 9 The **Creditor Receipt** screen will appear. (See **Figure 8**)

Creditors Receipt	
Case Number	36-0113
Total Creditors Added to Database	8

Figure 8

- ◆ Creditors are now attached to the bankruptcy case.

NOTE: Continue to repeat **Steps 1 - 9** for each creditor matrix to a bankruptcy case.

Motions/Applications

Motions or Applications are pleadings requesting the court to order and rule in favor of the applicant. The following instruction will guide you through the process for any motions or applications.

STEP 1 Click on [Motions/Applications](#) hypertext link to docket related motions or applications.

STEP 2 The **Case Number** screen will appear. (See Figure 1)

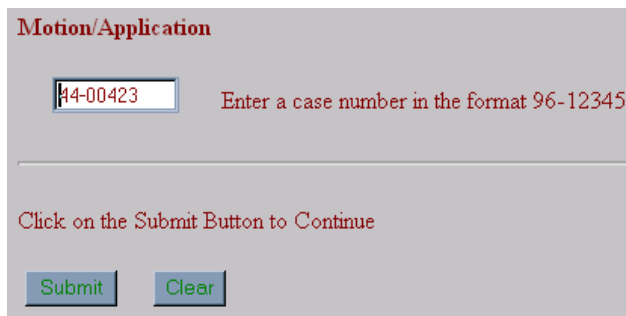
The screenshot shows a web form titled "Motion/Application". It features a text input field containing "H4-00423". To the right of the field is a red instruction: "Enter a case number in the format 96-12345." Below the input field is a horizontal line, followed by the text "Click on the Submit Button to Continue". At the bottom are two buttons: "Submit" and "Clear".

Figure 1

- ◆ Enter a case number, and click on the **[Submit]** button to continue.
- ◆ If the computer prompts that you entered an invalid case number, click on [Back](#) hypertext link to re-enter.

STEP 3 The **Case Verification** screen will appear. (See Figure 2)

The screenshot shows a web form titled "Motion/Application". It displays the case number "96-30023" and the case name "Morris Mulvaney" in blue text. Below this is a red instruction: "If the case(s) shown above is incorrect, click on a menu link shown above to restart". A horizontal line follows, with the text "Click on the Submit Button to Continue". At the bottom are two buttons: "Submit" and "Clear".

Figure 2

- ◆ Verify that the case number and case name.
- ◆ If case number and name do not match, click on the Netscape **Back** button to re-enter.
- ◆ Click on the **[Submit]** button to continue.

STEP 4 The **Party Filer** screen will appear. (See **Figure 3**)



Figure 3

- ◆ Select from the following list the party for whom you are filing the document. Click on the down ▼ arrow to the right of the box to scroll through the list.
- ◆ If the party you're searching for appears, click on it. Then click the **[Submit]** button to continue and proceed to **Step 9**.
- ◆ If the party does not appear, click on Add/create new party hypertext link.

STEP 5 The **Add Party** Screen will appear. (See **Figure 4**)

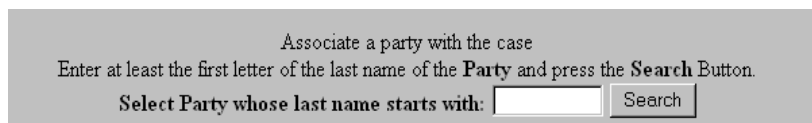


Figure 4

- ◆ Enter at least the first letter of the last name of the party and click on the **[Search]** button

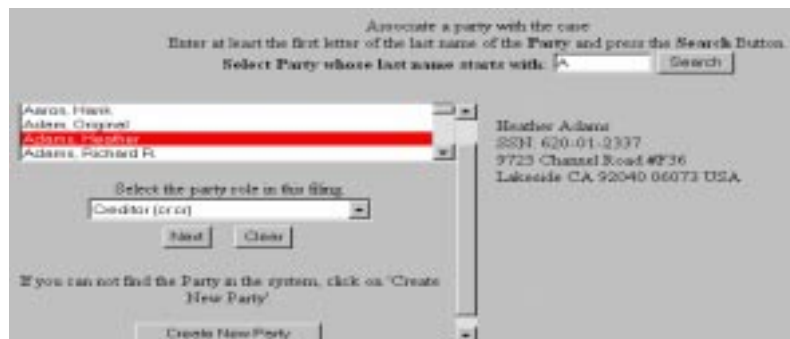


Figure 5

- a. Click on the down ▼ arrow to the right of the box to scroll through the list. (See **Figure 5**).
- b. If the party you're searching for appears, click on it. The party name and address will appear to the right, verify the address.
- c. Click on the down ▼ arrow to the right of the party role box and scroll through the list to select the title role of the party (i.e. Debtor, Creditor). Then click the **[Next]** button.

d. The **Modify Address** screen will appear. (See Figure 6)

Heather Adams (SSN# 620-01-2337)

Office			
Address 1	9725 Channel Road #F36		
Address 2			
Address 3			
City	Lakeside	State	CA
Zip	92040	Country	USA
Phone			

Submit Reset

Previous Page

Figure 6

- ◆ This screen will appear every time you select a party that exists or has been added to the system
 - ◆ If the address is incorrect, click inside the necessary field to make the correction.
 - ◆ Click on the **[Submit]** button to continue and proceed to **Step 8**.
- e. If you cannot find the party in the ECF system, click on the **[Create New Party]** button.
- f. The **New Person Information** screen will appear. (See Figure 7)

New Person Information

Last Name	Pearson	Role	Creditor (cr:cr)
First Name	Cory	Middle Name	
Generation		Title	
SSN		Tax ID	
Office		Address 1	
Address 2		Address 3	
City		State	
Zip		County	
County	San Diego	Phone	

Submit Clear

Figure 7

- ◆ Enter the party information in appropriate fields. Use the *Last Name* field for last name or full business name, press the tab key to advance to the *Role* field, and click on the ▼ arrow to the right of the box to select new persons role, (i.e., Creditor (cr:cr), then press the tab key to advance to the *First Name* field and enter first name. *Note: Bypass all other fields.*
- ◆ Click on the **[Submit]** button to continue.

STEP 7 Press the **[Continue]** button to proceed with the processing.

STEP 8 The **Party Filer** screen will appear. (See **Figure 8**)

Select from the following list the party for whom you are filing this document.

Drew Pearson [1] (3261:1)
Hanks, Tom [pty:ddb] (3077)
Wilson, Rita [pty:jtdb] (3078)
Wittman, Sandra J. [tr:tr] (1377)

Select (above) or add (Add/create new party link) the person.

[Add/create new party](#)

Click on the Submit Button to Continue

Submit Clear

Figure 8

- ◆ Select from the following list the party for whom you are filing the document.
- ◆ Click on the **[Submit]** button to continue.

STEP 9 The **Document Type** screen will appear. (See **Figure 9**)

Motion/Application

Select the type of motion(s) being filed.

To select multiple motions, hold down the control (Ctrl) key (PC users) or command key (MAC users) and click on the appropriate motions.

Motion for Adequate Protection
Motion for Ex Parte Relief
Motion for Joint Administration
Motion for More Definite Statement
Motion for Relief from Stay/Post
Motion for Summary Judgment
Motion to Allow Payment of Arrearages
Motion to Appoint

Click on the Submit Button to Continue

Submit Clear

Figure 9

Use the ▲▼ arrows to the right of the white box to find the type of motion or application to be filed, click on it, then click on the **[Submit]** button to continue. (See **Figure 4**)

- ◆ If multiple Motions or Applications are being filed, press and hold the ctrl key, and click the appropriate Motions/Applications.
- ◆ Click on the **[Submit]** button to continue.

STEP 10 The **Pdf Attachment** screen will appear. (See **Figure 10**)

- ◆ If there are supporting documents, click on the box next to the words **Last Document**, to remove check mark.



Figure 10

- ◆ Select the *pdf* filename of the document you are filing by using the following methods:
 1. Enter the full filename of the document to be filed in the text box; or
 2. Click on the [**Browse...**] button to navigate to the appropriate directory and file to select the document.
 - a. Click on the ▼ arrow to the right of Look in: to select Temp on 'Mis05\Vol1'(T).
 - b. Double click on folder titled **pdf**.
 - c. Click on the ▼ arrow to the right of Files of type: to select **Acrobat (*.pdf)**.
 - d. Highlight the *pdf* file with one right click of the mouse.
 - e. Select **open** on the menu with one right click to bring up the document for viewing and verification.
 - f. Close document with clicking on "X" in the upper right-hand corner.
 - g. Click on the [**O**pen] button to insert filename in the text box.
 - h. Click on the [**S**ubmit] button. If no supporting documents, proceed to **Step 12**.

STEP 11 The **Attachment** screen will appear. (See Figure 11)

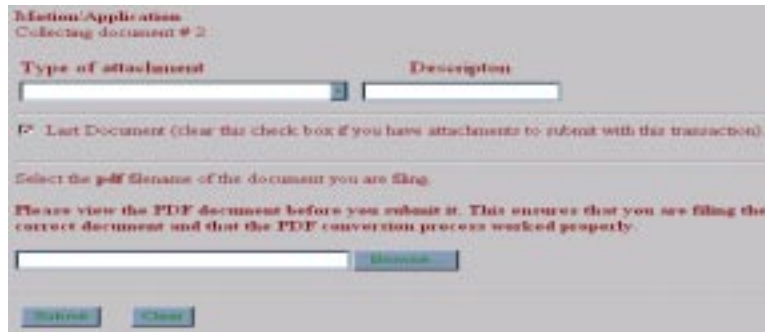


Figure 11

- ◆ Click on the ▼ arrow and click on the type of attachment.
- ◆ To describe the supporting document, click in the description box and type in the description.
- ◆ For more than one supporting document, click on the box next to the Last Document to remove the check mark.
- ◆ Type in the full filename of the first supporting document, or use the [Browse...] button, repeat **Steps 10,2(c-h)**.
- ◆ If last attachment, click on the [Submit] button to continue.

STEP 12 The **Data Element** screen will appear. (See Figure 12)




Figure 12

- ◆ If the document refers to an existing document, click inside the box to insert a check mark. This will allow you to link this document to a previously entered document.
- ◆ Click on the [Submit] button to continue.

STEP 13 The **Modify Text** screen will appear. (See **Figure 13**)

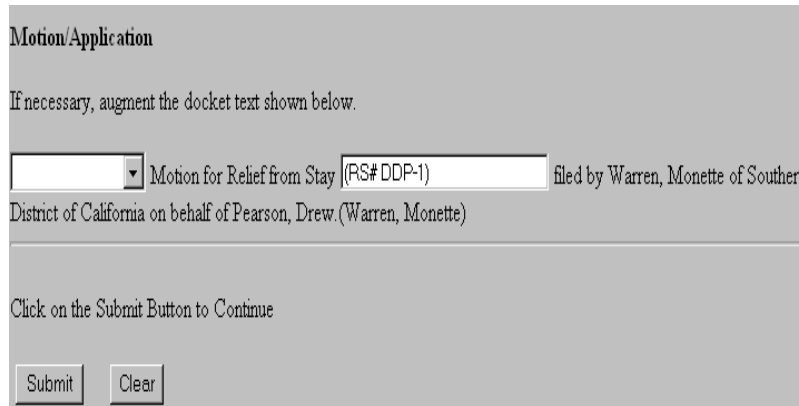


Figure 13

- ◆ To further define the document, click on the ▼ arrow to the right of the first box. (*i.e.*, *Amended*, *Ex Parte*, *etc.*).
- ◆ The second box is used to enter free text; (*i.e.*, RS # - DDP-1). Enter additional text as needed.
- ◆ Click on the [Submit] button to continue.

STEP 14 The **Final Approval** screen will appear. (See **Figure 14**)



Figure 14

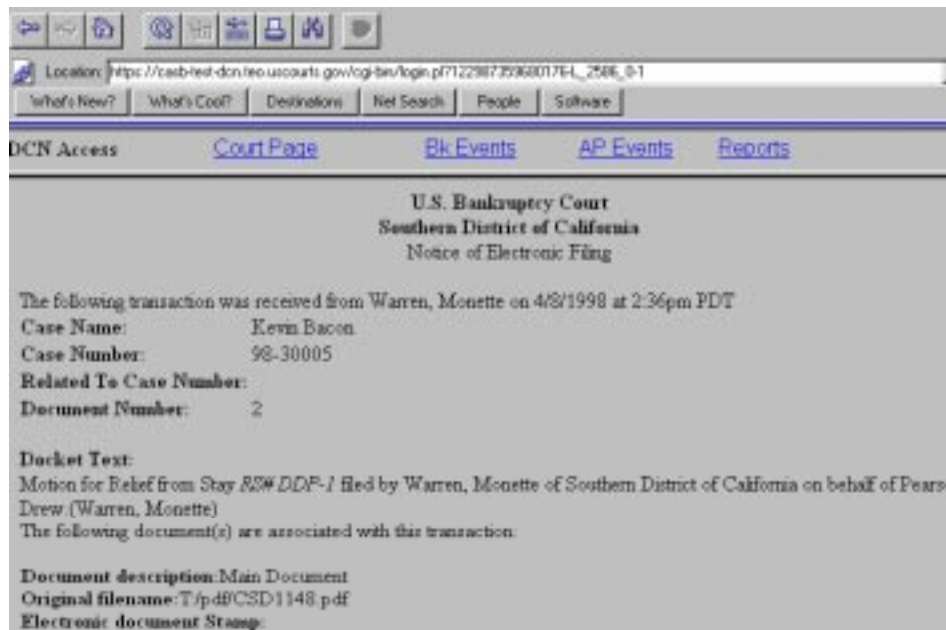
- ◆ Verify Final docket text.
- ◆ If final docket text is correct, proceed to Step 15.
- ◆ If final docket text is incorrect, to modify a previous screen, click on the Netscape Back button to find the screen to be modified.
- ◆ To abort or restart the transaction, click on [Bk Events](#).

STEP 15 Click on [Submit filing to court](#).

STEP 16 Click on the **[Print]** button at the upper left-hand corner of the Netscape screen to print out the Notice of Electronic Filing.

*The **Notice of Electronic Filing** will appear each time you submit a filing to the court through the ECF System. Each notice will include the following:*

- ◆ Who filed the document:
- ◆ Date and Time:
- ◆ Case Name:
- ◆ Case Number:
- ◆ Document Number:
- ◆ Docket Text:
- ◆ Document Description:
- ◆ Original filename (*pdf*):
- ◆ Electronic document Stamp:



Notice of Electronic Filing

Answer/Response

An answer/response is a formal written statement presented by the parties in a case which form the basis for the lawsuit and define the issues. The following instructions will guide you through the Electronic Case Filing (ECF) system for Answer/Response documents.

STEP 1 Click on [Answer/Response](#) hypertext link from the ECF main menu.

STEP 2 Click on [Other Answers](#) hypertext link to continue. (See **Figure 1**)

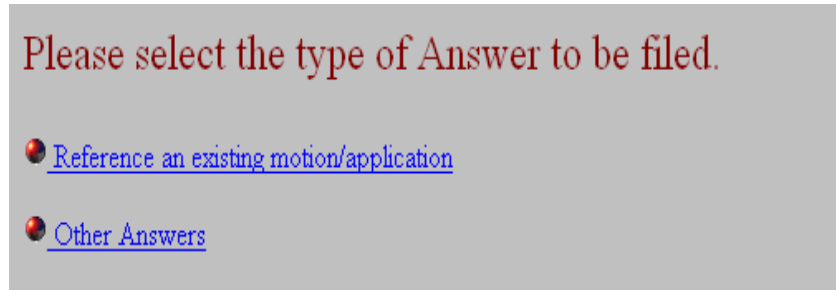


Figure 1

STEP 3 The **Case Number** screen will appear. (See **Figure 2**)

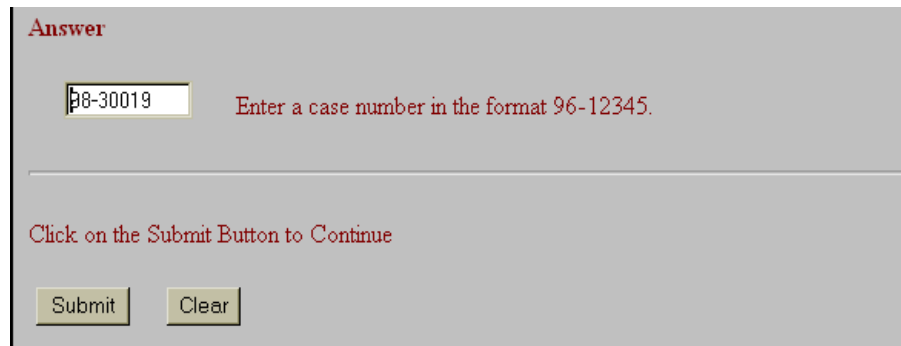
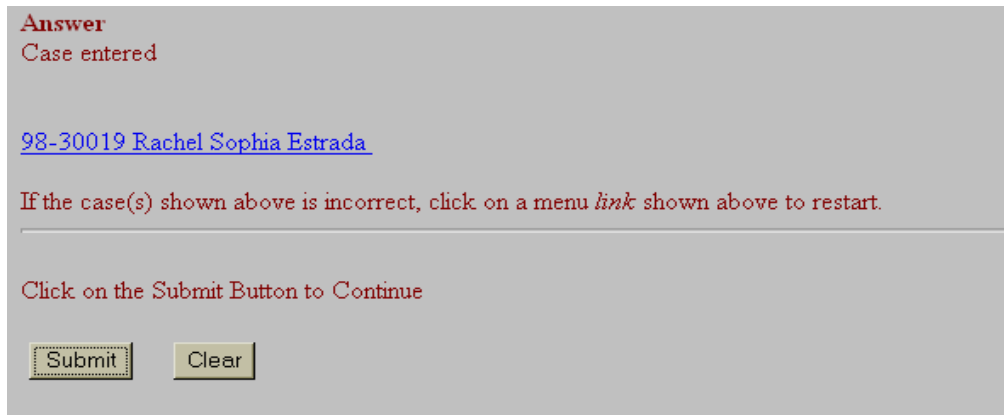
A screenshot of a web form titled "Answer" in red text. It features a text input field containing "98-30019". To the right of the field is the instruction "Enter a case number in the format 96-12345." in red. Below the input field is a horizontal line, followed by the text "Click on the Submit Button to Continue" in red. At the bottom are two buttons: "Submit" and "Clear", both in a light gray box with black text.

Figure 2

- ◆ Enter the case number, and click on the **[Submit]** button to continue.
- ◆ If the computer prompts that you have entered an invalid case number, click on the [Back](#) hypertext link to re-enter the case number.

STEP 4 The **Case Verification** screen will appear. (See **Figure 3**)



Answer
Case entered

[98-30019 Rachel Sophia Estrada](#)

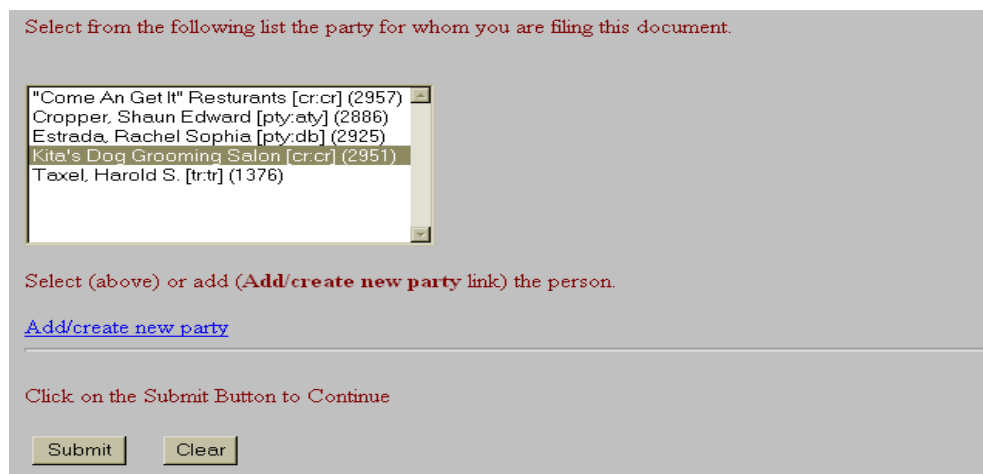
If the case(s) shown above is incorrect, click on a menu *link* shown above to restart.

Click on the Submit Button to Continue

Figure 3

- ◆ Verify the case number and case name.
- ◆ If case number and name do not match, click on the Netscape **Back** button to re-enter the case number.
- ◆ Click on the [**Submit**] button to continue.

STEP 5 The **Party Filer** screen will appear. (See **Figure 4**)



Select from the following list the party for whom you are filing this document.

"Come An Get It" Restaurants [cr:cr] (2957)
Cropper, Shaun Edward [pty:aty] (2886)
Estrada, Rachel Sophia [pty:db] (2925)
Kita's Dog Grooming Salon [cr:cr] (2951)
Taxel, Harold S. [tr:tr] (1376)

Select (above) or add (Add/create new party link) the person.

[Add/create new party](#)

Click on the Submit Button to Continue

Figure 4

- ◆ Click on the down ▼ arrow to the right of the box to scroll through the party list.
- ◆ Click on the attorney name as filing the document. Click on the [**Submit**] button, proceed to **Step 10** .
- ◆ If the party is not listed, click on the [Add/create new party](#) hypertext link, proceed to **Step 6** .

STEP 6 The **Add Attorney** screen will appear. (See **Figure 5**)

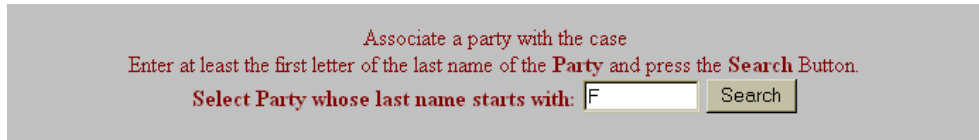


Figure 5

- a. Enter at least the first letter of the last name of the Party and click on the **[Search]** button.



Figure 6

- b. If the party you are searching for appears, click on it. The party's address will appear to the right, verify address. (See **Figure 6**) Verify the party role is identified; i.e., *Creditor (cr:cr)*. Click on the **[Next]** button and proceed to **Step 6d**.
- c. If you can not find the party in the system, click on the **[Create New Party]** button , proceed to **Step 7**.

- d. The **Modify Address** screen will appear. (See **Figure 7**)

First Commercial Mortgage Company

Office			
Address 1			
Address 2			
Address 3			
City		State	
Zip		Country	
Phone			

Submit Reset

Previous Page

Figure 7

- ◆ This screen will appear every time you select a party that exists or has been added to the system.
- ◆ If the address is incorrect, click inside necessary fields to make corrections.
- ◆ Click on the **[Submit]** button to continue, proceed to **Step 9**.

STEP 7 The **New Person Information** screen will appear. (See **Figure 8**) This screen is designed to accommodate all possible information of a new person being added to the case.

New Person Information

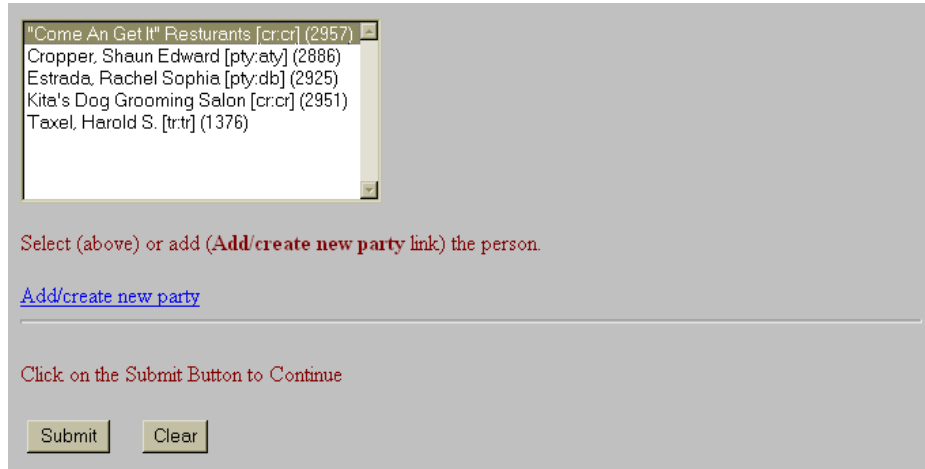
Last Name		Role	Debtor (deb.py)
First Name		Middle Name	
Generation		Title	
SSN		Tax ID	
Office		Address 1	
Address 2		Address 3	
City		State	
Zip		Country	
County	San Diego	Phone	

Figure 8

- ◆ Enter the party information, and click on the **[Submit]** button to continue.
Note: Omit fields that do not apply.(i.e., Generation, Title, Tax ID, Office, etc.)

STEP 8 Click on the [**Continue**] button to continue processing.

STEP 9 The **Party Filer** screen will appear. (See Figure 9)



"Come An Get It" Restaurants [cr:cr] (2957)
Cropper, Shaun Edward [pty:aty] (2886)
Estrada, Rachel Sophia [pty:db] (2925)
Kita's Dog Grooming Salon [cr:cr] (2951)
Taxel, Harold S. [tr:tr] (1376)

Select (above) or add (Add/create new party link) the person.

[Add/create new party](#)


Click on the Submit Button to Continue

Submit Clear

Figure 9

- ◆ Click on the down ▼ arrow to the right of the box to scroll through the party list.
- ◆ If more than one party, press and hold *ctrl* key, then click on the appropriate parties.
- ◆ Click on the [**Submit**] button to continue.

STEP 10 The **Answer Type** screen will appear. (See Figure 10)



Answer

Select the type of answer(s) being filed.

Answer to Involuntary Petition
Declaration
Memorandum of Points and Authorities
Opposition
Response

Click on the Submit Button to Continue

Submit Clear

Figure 10

- ◆ Click on the ▼ arrow to the right of the box to scroll through the type of answer being filed. (Example: Response, Declaration, Opposition, etc.)
- ◆ Click to select the document being filed.
- ◆ Click on the [Submit] button to continue.

STEP 11 The **Pdf Attachment** screen will appear. (See Figure 11)

Answer

☒ Last Document (clear this check box if you have attachments to submit with this transaction).

Select the **pdf** filename of the document you are filing.

Please view the PDF document before you submit it. This ensures that you are filing the correct document and that the PDF conversion process worked properly.

T:\pdfpractice\petition.pdf Browse...

Submit Clear

Figure 11

- ◆ If there are supporting documents, click on the box next to the words **Last Document**, to remove check mark.
- ◆ Select the *pdf* filename of the document you are filing by using the following methods:
 1. Enter the full filename of the document to be filed in the text box; or
 2. Click on the [Browse...] button to navigate to the appropriate directory and file to select the document.
 - a. Click on ▼ arrow to the right of Look in: to select **Temp on'Mis05\vol1'** (T:).
 - b. Double click on the folder titled **pdf**. (Use scroll bar)
 - c. Click on ▼ arrow to the right of Files of type: to select **Acrobat (*.pdf)**.
 - d. Highlight the PDF file with one right click of the mouse.
 - e. Select **Open** on the menu with one right click, this will bring the document for viewing and verification.
 - f. Close the document by clicking on "X" in the upper right-hand corner.
 - g. Click on the [Open] button to insert name in the text box.
 - h. Click on the [Submit] button to continue. If no supporting documents, proceed to **Step 13**.

STEP 12 The **Attachment** screen will appear. (See Figure 12)

Figure 12

- ◆ Click on the ▼ arrow and click on the type of attachment.
- ◆ To describe the supporting document, click in the Description box and type in description.
- ◆ For more than one supporting document, click on the box next to Last Document to remove the check mark.
- ◆ Type in full file name of the first supporting document, or use the [Browser...] button, repeat **Step 11, 2(c-h)**.
- ◆ If last attachment, click on the [Submit] button to continue.

STEP 13 The **Data Element** screen will appear. (See Figure 13)

Figure 13

- ◆ Click to place a check mark next to "Does this filing refer to an existing document in this case?"
- ◆ Click on the **[Submit]** button to continue. If this does not refer to an existing document, proceed to **Step 16**.

STEP 14 The **Category Type** screen will appear. (See Figure 14)

Please select the category of documents to which your document refers.

ans
answer
appeal
claims
cmp
misc
motion
notice
order
summon
trustee

If correct, press Submit.

Submit Clear

Figure 14

- ◆ Click on the category which your document refers.
- ◆ If multiple categories, press and hold the **ctrl** key and click on the appropriate categories.
- ◆ Click on the **[Submit]** button to continue.

STEP 15 The **Document List** screen will appear. (See Figure 15)

Include	Date	#	Docket Text
<input type="checkbox"/>	03/18/1998	5	Motion for Relief from Stay <i>RSW SOLI</i> Submission of this motion constitutes, if necessary, a credit card authorization. filed by Solo, Han on behalf of Estrada, Rachel (Estrada, S.)
<input type="checkbox"/>	03/19/1998	15	Motion for Relief from Stay <i>RSW SCT</i> Submission of this motion constitutes, if necessary, a credit card authorization. filed by Estrada on behalf of Cropper, Shaun (Estrada,)
<input checked="" type="checkbox"/>	03/20/1998	16	Motion for Relief from Stay <i>RSW ESI</i> Submission of this motion constitutes, if necessary, a credit card authorization. filed by Estrada on behalf of Kita's Dog Grooming Salon (Estrada,)
<input type="checkbox"/>	03/20/1998	17	Motion for Relief from Stay <i>RSW MWI</i> Submission of this motion constitutes, if necessary, a credit card authorization. filed by Warren, Monette on behalf of "Come An Get It" Restaurants (Warren, Monette)

If correct, press Submit.

Submit Clear

Figure 15

- ◆ Click to place a check mark on the appropriate document for this answer/response being filed.
- ◆ Click on the **[Submit]** button to continue.

STEP 16 The **Modify Text** screen will appear. (See Figure 16)

If necessary augment the docket text shown below.

Declaration by Ralph B. Wow (related document(s)[16]) Filed by Warren, Monette on behalf of Kita's Dog Grooming Salon. (Warren, Monette)

Click on the Submit Button to Continue

Figure 16

- ◆ Verify the docket text.
- ◆ Click on the down ▼ arrow to the right of the drop down list box to scroll to select if document is an Alias, Amended, ExParte, etc.
- ◆ Enter pertinent information in the second text box, when applicable.
- ◆ Click on the **[Submit]** button to continue.

STEP 17 The **Final Approval** screen will appear. (See Figure 17)

Answer

Final Approval

Examine the docket text shown below.

This submission is subject to review, modification or rejection by the Clerk of Court.

Declaration by Ralph B. Wow (related document(s)[16]) Filed by Warren, Monette on behalf of Kita's Dog Grooming Salon. (Warren, Monette)

Final Submission.



[Submit filing to court](#)

Figure 17

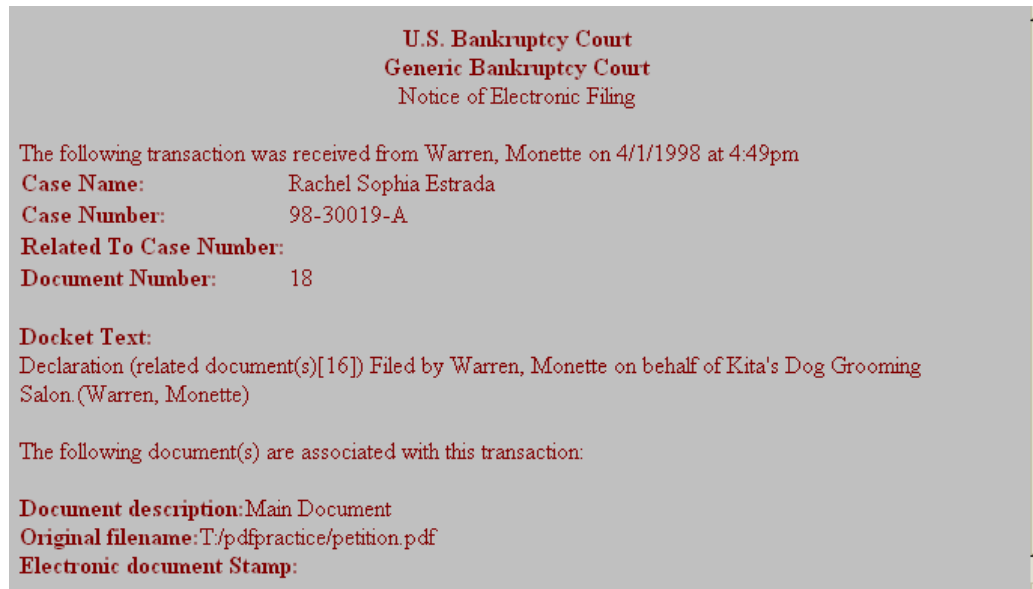
- ◆ Verify the Final Docket Text.
- ◆ If final docket text is correct, proceed to **Step 18**.
- ◆ If final docket text is incorrect, to modify a previous screen, click on the **Back** button at the top of the Netscape screen to find the screen to be modified.
- ◆ To abort or restart the transaction, click on the [Bk Events](#).

STEP 18 Click on the hypertext link [Submit filing to court](#).

- ◆ Click on the **Print** icon at the top of the Netscape screen to print out *Notice of Electronic Filing*.

The **Notice of Electronic Filing** will appear each time you submit a filing to the court through the ECF system. Each notice will include the following:

- ◆ Who filed the document:
- ◆ Date and Time:
- ◆ Case Name:
- ◆ Case Number:
- ◆ Document Number:
- ◆ Docket Text:
- ◆ Document Description:
- ◆ Original filename (*pdf*):
- ◆ Electronic Document Stamp:



Notice of Electronic Filing

Notices

Notices are information concerning a fact, to direct positive knowledge of fact in question or information sufficient to put a prudent person on inquiry as to such fact. The following instruction will guide you through the Electronic Case Filing (ECF) system for any notices.

In order to enter a hearing date/time/location you must obtain prior approval from the presiding judge. Contact the Courtroom Deputy for Judge assigned.

STEP 1 Click on [Notices](#) hypertext link from the ECF main menu.

STEP 2 The **Case Number** screen will appear. (See Figure 1)

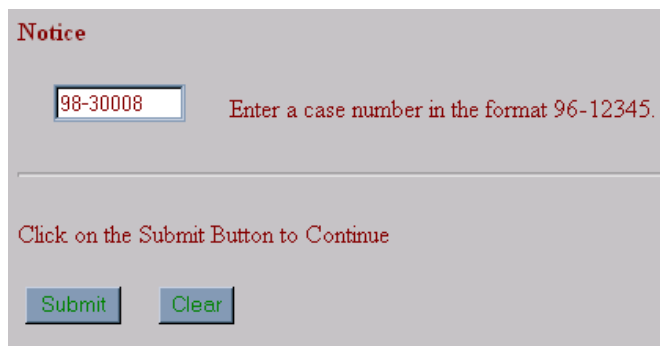


Figure 1

- ◆ Enter a case number, and click on the **[Submit]** button to continue.
- ◆ If the computer prompts that you entered an invalid case number, click on [Back](#) hypertext link to re-enter.

STEP 3 The **Case Verification** screen will appear. (See Figure 2)

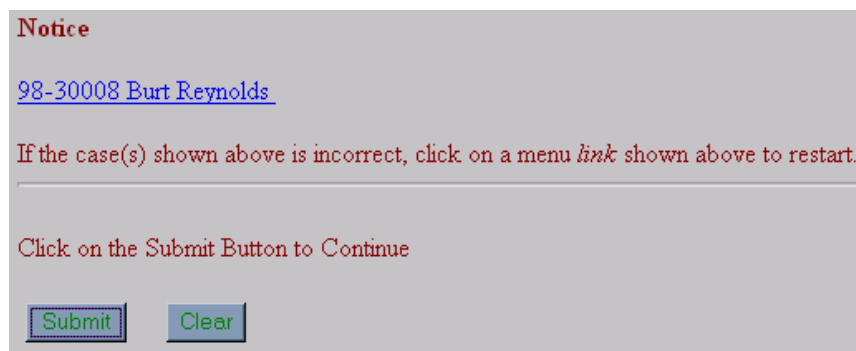


Figure 2

- ◆ Verify the case number and case name.
- ◆ If case number and name do not match, click on the Netscape **Back** button to re-enter.
- ◆ Click the **[Submit]** button to continue.

STEP 4 The **Party Filer** screen will appear. (See **Figure 3**)

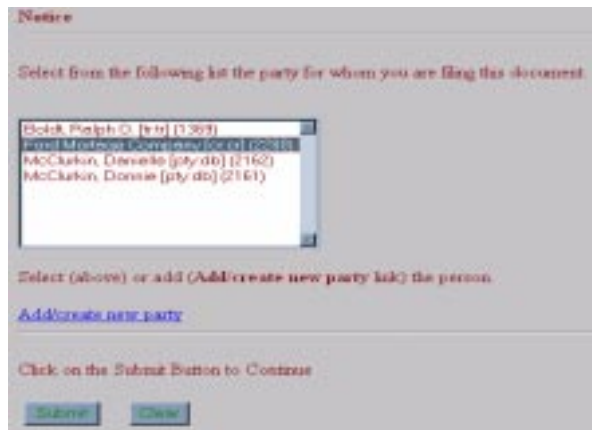


Figure 3

- ◆ Click on the ▼ arrow to the right of the box to scroll through the list.
- ◆ Click on the party filing the document. Click on the **[Submit]** button, proceed to **Step 9**.
- ◆ If the name does not appear, click on the [Add/create new party](#) hypertext link.

STEP 5 The **Add Party** screen will appear. (See **Figure 4**)

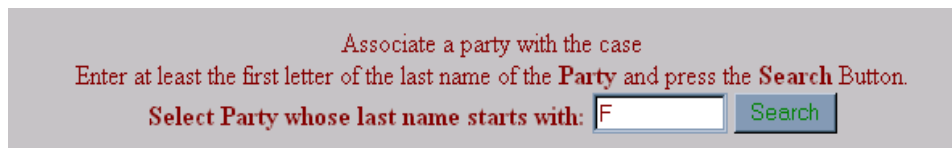


Figure 4

- a. Enter a least the first letter of the last name of the Party and click on the **[Search]** button.
- b. If the party you're searching for appears, click on it. The party's address will appear to the right if debtor, verify address and SSN, if applicable. (See **Figure 5**) Verify the party role is identified; i.e., *Creditor (cr:cr)*. Click on the **[Next]** button and proceed to **Step 5d**.
- c. If you can not find the party in the system, click on the **[Create New Party]** button, proceed to **Step 6**.

Flowers, Valerie Jenice
Ford Motor Company
Ford Motor Credit Company
Ford Motor Credit Company
Ford Motor Credit Corporation

Ford Motor Credit Company
Tax Id 23456
8882 First Ave
San Diego CA 92101 USA

Select the party role in this filing

Creditor (or not)

Next Clear

If you can not find the Party in the system, click on 'Create New Party'

Create New Party

Figure 5

- d. The **Modify Address** screen will appear. (See **Figure 6**)

Ford Motor Credit Company(TaxID# 23456)

Office

Address 1 8882 First Ave.

Address 2

Address 3

City San Diego State CA

Zip 92101 Country USA

Phone

Submit Reset

Previous Page

Figure 6

- ◆ This screen will appear every time you select a party that exists or has been add to the system.
- ◆ If the address is incorrect, click inside necessary fields to make corrections.
- ◆ Click on the **[Submit]** button to continue, proceed to **Step 9**.

Step 6 The **New Person Information** screen will appear. (See **Figure 7**)



The 'New Person Information' form is a web-based interface for entering party details. It features a two-column layout of input fields. The first column includes fields for Last Name (pre-filled with 'Ford Credit Company'), First Name, Generation, SSN, Office, Address 2, City, Zip, and County (pre-filled with 'San Diego'). The second column includes fields for Role (pre-filled with 'Creditor (cncf)'), Middle Name, Title, Tax ID, Address 1, Address 3, State, Country, and Phone. At the bottom, there are 'Submit' and 'Clear' buttons.

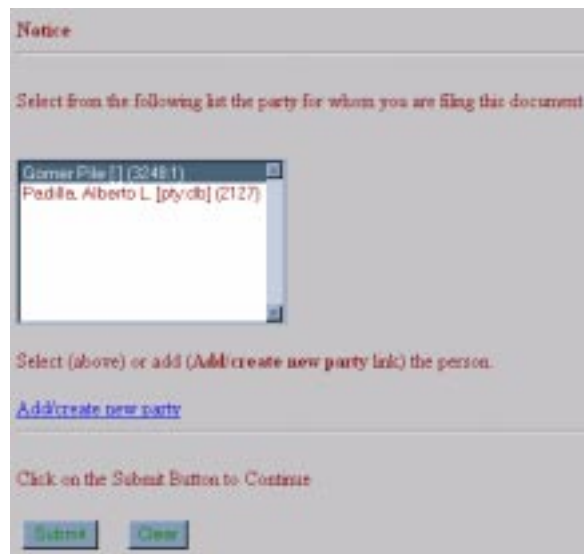
Last Name	Ford Credit Company	Role	Creditor (cncf)
First Name		Middle Name	
Generation		Title	
SSN		Tax ID	
Office		Address 1	
Address 2		Address 3	
City		State	
Zip		Country	
County	San Diego	Phone	

Figure 7

- ◆ Enter the party information and click on the [Submit] button to continue.
Note: Omit fields that do not apply. (i.e., generation, Title, Tax ID, Office, etc.)

STEP 7 Click on the [**Continue**] button to continue processing.

STEP 8 The **Party Filer** screen will appear. (See **Figure 8**)

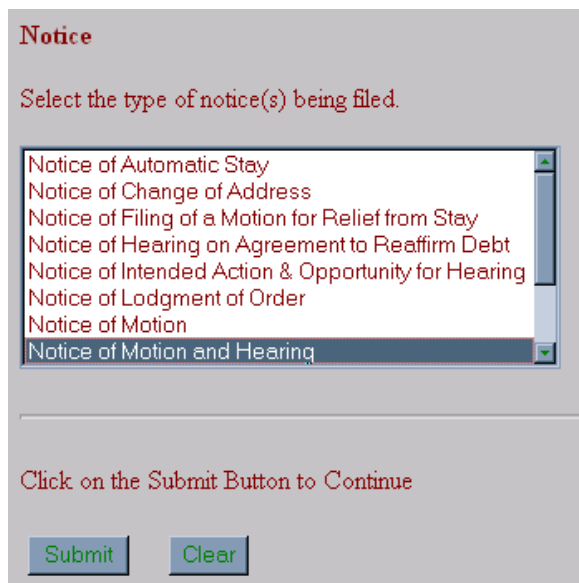


The 'Party Filer' screen displays a 'Notice' at the top. Below it, a text prompt asks the user to 'Select from the following list the party for whom you are filing this document.' A scrollable list box contains two entries: 'Gomez Pile [] (32481)' and 'Padilla, Alberto L. [py/cb] (2127)'. Below the list, a text prompt says 'Select (above) or add (Add/create new party link) the person.' followed by a blue hyperlink 'Add/create new party'. At the bottom, a text prompt says 'Click on the Submit Button to Continue' above 'Submit' and 'Clear' buttons.

Figure 8

- ◆ Click on the ▼ arrow to the right of the box to scroll through party list.
- ◆ If more than one party, press and hold the **ctrl** key, then click on the appropriate parties.
- ◆ Click on the [**Submit**] button to continue.

STEP 9 The **Event Type** screen will appear. (See **Figure 9**)

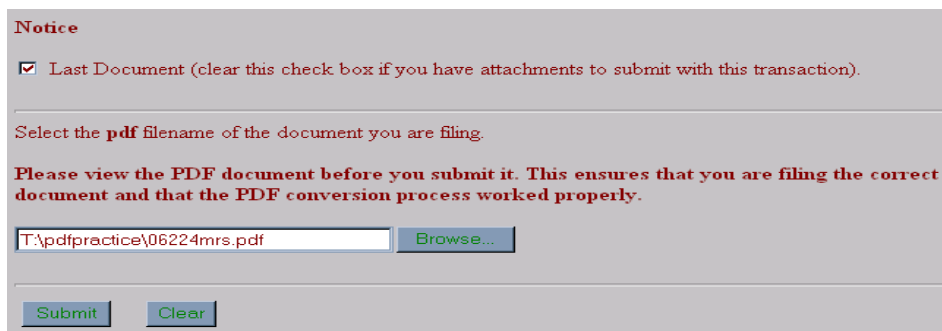


The screenshot shows a web form titled "Notice". Below the title is the instruction "Select the type of notice(s) being filed." There is a scrollable list box containing the following options: "Notice of Automatic Stay", "Notice of Change of Address", "Notice of Filing of a Motion for Relief from Stay", "Notice of Hearing on Agreement to Reaffirm Debt", "Notice of Intended Action & Opportunity for Hearing", "Notice of Lodgment of Order", "Notice of Motion", and "Notice of Motion and Hearing". The "Notice of Motion and Hearing" option is currently selected. Below the list box is the instruction "Click on the Submit Button to Continue". At the bottom of the form are two buttons: "Submit" and "Clear".

Figure 9

- ◆ Use the ▼ arrow to the right of the box to scroll through the event list to select the document being filed.
- ◆ Click on the [**Submit**] button to continue.

STEP 10 The **Pdf Attachment** screen will appear. (See **Figure 10**)



The screenshot shows a web form titled "Notice". At the top, there is a checked checkbox with the label "Last Document (clear this check box if you have attachments to submit with this transaction)." Below this is the instruction "Select the pdf filename of the document you are filing." A red warning message states: "Please view the PDF document before you submit it. This ensures that you are filing the correct document and that the PDF conversion process worked properly." Below the warning is a text input field containing the filename "T:\pdfpractice\06224mrs.pdf" and a "Browse..." button. At the bottom of the form are two buttons: "Submit" and "Clear".

Figure 10

- ◆ If there are supporting documents, click on the box next to the words Last Document, to remove the check mark.
- ◆ Select the *pdf* filename of the document you are filing by using the following methods:
 1. Enter the full filename of the document to be filed in the space provided; or
 2. Click on the [**Browse...**] button to navigate to the appropriate directory and file to select the document.
 - a. Click on the ▼ arrow to the right of *Look in:* to select **Temp on 'Mis05\Vol1'(T)**.
 - b. Double click on folder titled **pdf**.
 - c. Click on the ▼ arrow to the right of *Files of type:* to select **Acrobat (.pdf*)**
 - d. Highlight the pdf file with one right click of the mouse.

- e. Select **Open** from the drop down menu with one right click, this will bring up the document for viewing and verification.
- f. Close the document by clicking on “X” in the upper right-hand corner.
- g. Click on the [**Open**] button to insert the filename in the text box.
- h. Click on the [**Submit**] button to continue. If there are no supporting documents, proceed to **Step 12**.

STEP 11 The **Attachment** screen will appear. (See Figure 11)

The screenshot shows a web form titled "Notice Collecting document # 2". It has two columns: "Type of attachment" and "Description". Under "Type of attachment", there is a dropdown menu currently showing "Certificate of Service". Under "Description", there is a text box containing "tion for Relief From Stay". Below these fields is a checkbox labeled "Last Document (clear this check box if you have attachments to submit with this transaction)." which is currently checked. A red instruction line reads: "Select the pdf filename of the document you are filing." Below this is another red instruction: "Please view the PDF document before you submit it. This ensures that you are filing the correct document and that the PDF conversion process worked properly." Under the second instruction is a text box containing "T:\pdf\06224nrs.pdf" and a "Browse..." button. At the bottom of the form are two buttons: "Submit" and "Clear".

Figure 11

- ◆ Click on the ▼ arrow to the right of *Type of attachment* and click on the type of attachment.
- ◆ To describe the supporting document, click inside the *Description* box and type description.
- ◆ For more than one supporting document, click on the box next to **Last Document** to remove the check mark.
- ◆ Type in full filename of the first supporting document, or use the [**Browse...**] button, repeat **Step 10**, 2(c-h).
- ◆ If last attachment, click on the [**Submit**] button to continue.

STEP 12 The **Data Element** screen will appear. (See Figure 12)

The following are additional data elements related to this docket entry; please fill them in as appropriate. If no data elements appear simply press the next button to continue with the filing.

☐ Does this filing refer to an existing document in this case? (If yes, click on the box)
NOTE: If the event you are docketing is an answer/response, you will be prompted on a subsequent screen for its related motion. Therefore, do not click on this box to establish a relationship to the motion you are answering.

Date document filed (mandatory)
10/01/1998

Hearing Information

In order to enter a hearing date/location, you must obtain prior approval from the presiding judge. Contact the Courtroom Deputy for Judge. No Judge assigned.

Hearing Time: ☐ AM ☐ PM Hearing Date:

Location:

Enter an Opposition due date [optional field]
10/01/1998

Click on the Submit Button to Continue

Figure 12

- ◆ The following are additional data elements related to this docket entry, fill in as appropriate.
- ◆ If this filing refers to an existing document in this case, click on the box.
- ◆ Verify date document was filed. (*Use today's date*).
- ◆ Click inside **Hearing Time:** field to enter time and click on **AM or PM**. Click inside **Hearing Date:** to enter date of hearing.
- ◆ Click on the ▼ arrow to the right of **Location** to choose the Courtroom the hearing will be held.
- ◆ The Opposition due - Information date is defaulted.
- ◆ Click on the [**Submit**] button to continue. If this document does not refer to any related document, proceed to **Step 15**.

STEP 13 The **Category Type** screen will appear. (See Figure 13)

Notice

Please select the category of documents to which your document refers.

ans
answer
appeal
claims
cmp
misc
motion
notice
order
summon
trustee

If correct, press Submit.

Submit Clear

Figure 13

- ◆ Click on the category that you want to link to the document you are filing.
- ◆ If multiple categories, press and hold the **ctrl** key and click on appropriate category.
- ◆ Click on the **[Submit]** button to continue.

STEP 14 The **Document List** screen will appear. (See Figure 14)

Notice

Include	Date	#	Docket Text
<input type="checkbox"/>	01/15/1998	3	Amended Motion for Relief from Stay (<i>RS# DDP-1</i>) scheduled for 2/13/1998 at 10:00 AM at Room 129, Weinberger Courthouse Objections due by 2/12/1998, filed by Warren, Monette of Southern District of California on behalf of Ford Mortgage Company. Filing fee collected, receipt #45821. (Warren, Monette)

If correct, press Submit.

Submit Clear

Figure 14

- ◆ Click on the box to place a check mark on the appropriate document description.
- ◆ Verify the document being linked is the correct document.
- ◆ Click on the **[Submit]** button to continue.

STEP 15 The **Modify Text** screen will appear. (See **Figure 15**)

Notice

If necessary, augment the docket text shown below.

Notice of Motion and Hearing with Certificate of Service

(related document(s)[1]) scheduled for 4/23/1998 at 10:00 AM at Courtroom 3, Room 129, Weinberger Courthouse Oppositions due by 4/9/1998, filed by Sachs, Michael of Sachs & Fones on behalf of Reynolds, Burt.(Warren, M.)

Click on the Submit Button to Continue

Figure 15

- ◆ To further define the document, click on the ▼ arrow to the right of the first box and select Amended, Emergency, Ex Parte, etc., *if applicable*.
- ◆ Click inside the second text box to add an additional information.
- ◆ Click on the **[Submit]** button to continue.

STEP 16 The **Final Approval** screen will appear. (See **Figure 16**)

DCN Access [Court Page](#) [Bk Events](#) [AP Events](#) [Reports](#) [Restricted](#)

Notice
Final Approval

Examine the docket text shown below
This submission is subject to review, modification or rejection by the Clerk of Court.

Notice of Motion and Hearing with Certificate of Service (related document(s)[1]) scheduled for 4/23/1998 at 10:00 AM at Courtroom 3, Room 129, Weinberger Courthouse Oppositions due by 4/9/1998, filed by Sachs, Michael of Sachs & Fones on behalf of Reynolds, Burt (Warren, M.)

Final Submission.


 [Submit filing to court](#)

Figure 16

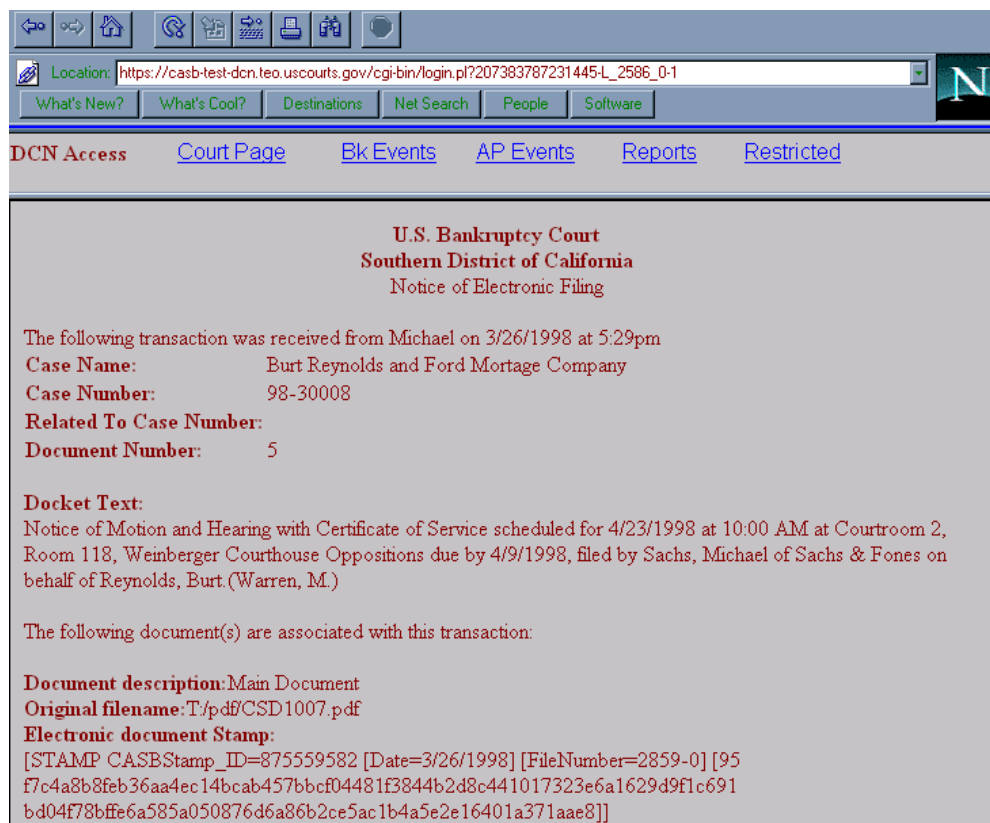
- ◆ Verify Final docket text.
- ◆ If final docket text is correct, proceed to **Step 17**.
- ◆ If final docket text is incorrect, to modify a previous screen, click on the Netscape **Back** button to find the screen to be modified.
- ◆ To abort or restart the transaction, click on [Bk Events](#).

STEP 17 Click on the hypertext link [Submit filing to court](#).

STEP 18 Click on the **Print** icon at the top of the Netscape screen to print out Notice of Electronic Filing.

The Notice of Electronic Filing will appear each time you submit a filing to the court through the ECF System. Each notice will include the following:

- ◆ Who filed the document:
- ◆ Date and Time:
- ◆ Case Name:
- ◆ Case Number:
- ◆ Document Number:
- ◆ Docket Text:
- ◆ Document Description:
- ◆ Original filename (*pdf*):
- ◆ Electronic document Stamp:



Notice of Electronic Filing

Set Up Automatic Mail Notification

The automatic mail notification function will allow you to receive notification via e-mail. This procedure will guide you through the selection process.

STEP 1 The interested party will access the ECF system through the Netscape icon.

- ◆ Enter assign login and password. (See Figure 1)
- ◆ Click on the **[Submit]** button to continue.

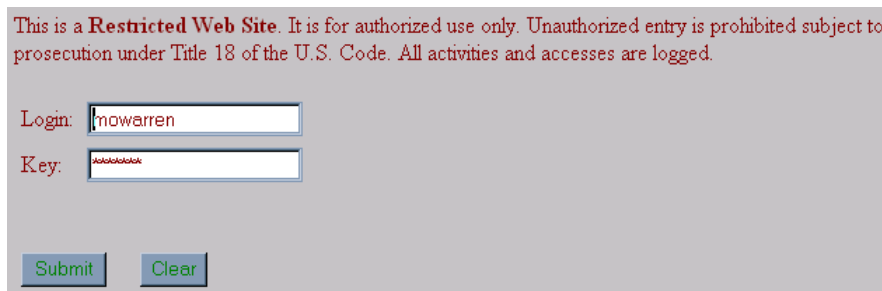


Figure 1

STEP 2 Click on [Reports](#) located on the DCN Access bar to access the Automatic Mail Notification. (See Figure 2)



Figure 2

STEP 3 Click on the [Set Up Automatic Mail Notification](#) hypertext link, located under the title Other. (See Figure 3)

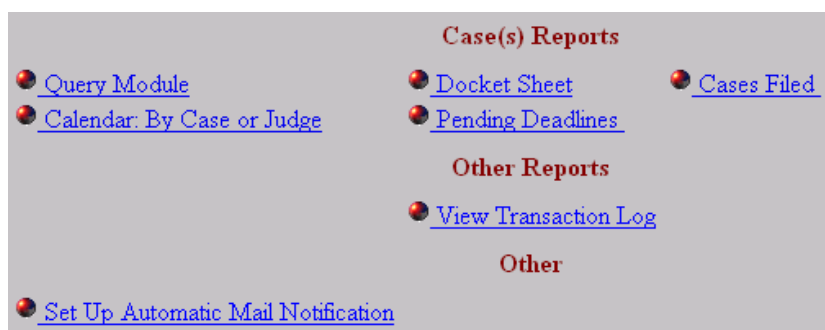


Figure 3

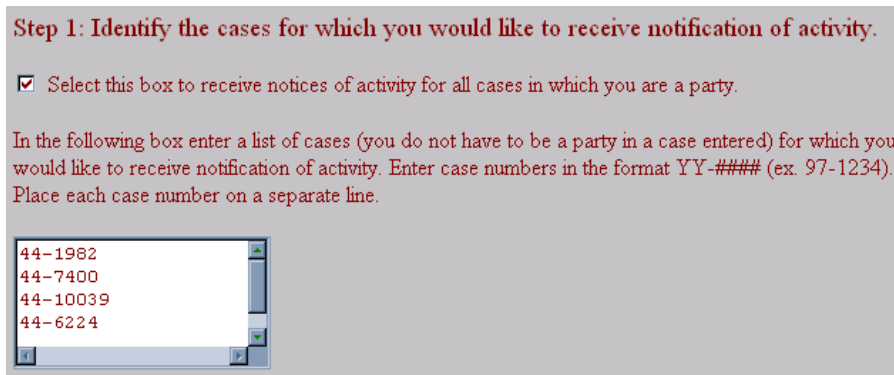
STEP 4

To set up notification, you have four selections to choose from.

- Selection 1 - Receive notification in all case(s) you are a party, and case(s) you are not a party, but would like to receive notice.
- Selection 2 - Receive copies of Notice of Electronic filings.
- Selection 3 - Receive a summary report at the end of each day.
- Selection 4 - Enter the e-mail address(es) to receive notification.

Selection 1: Selection one has two parts. (See Figure 4)

1. Receive notification of all case(s) you are a party.
 - ◆ Click inside the box to the left of *Select this box to receive notices of activity for all cases in which you are a party.*
2. Identifies the case(s) for which you would like to receive notification of activity. *Note: You do not have to be a party in a case to receive notification.*
 - ◆ Click inside the text box to enter a list of case(s) for which you would like to receive notification of activity. Enter the case number in the format YY-#### (i.e., 97-1234).



Step 1: Identify the cases for which you would like to receive notification of activity.

☒ Select this box to receive notices of activity for all cases in which you are a party.

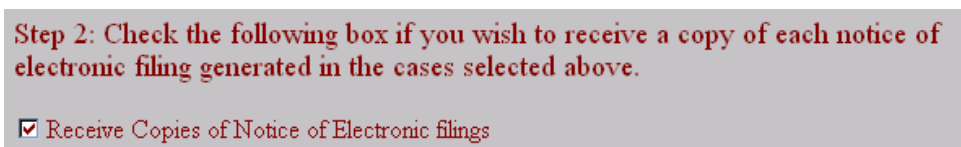
In the following box enter a list of cases (you do not have to be a party in a case entered) for which you would like to receive notification of activity. Enter case numbers in the format YY-#### (ex. 97-1234). Place each case number on a separate line.

44-1982
44-7400
44-10039
44-6224

Figure 4

Selection 2: If you would like to receive a copy of each notice of electronic filing generated in the case(s) selected above.

- ◆ Click inside the box to the left of *Receive Copies of Notice of Electronic Filing.* (See Figure 5)



Step 2: Check the following box if you wish to receive a copy of each notice of electronic filing generated in the cases selected above.

☒ Receive Copies of Notice of Electronic filings

Figure 5

Selection 3: At the end of each day you will receive a summary report listing all cases (as selected above in Figure 4) for which filings occurred during the day. (See Figure 6)

- ◆ Click inside the box to the left of *Summary report.*

Step 3: Check the following box if you wish to receive a listing at the end of each day listing all cases (as selected above) for which filings occurred during the day.

☒ Summary report

Figure 6

Selection 4: To receive any type of notification it is essential for you enter your e-mail address.

- ◆ Click inside text box to enter your e-mail address or addresses to which the information should be mailed. (See Figure 7)
- ◆ Click on the [Submit] button to continue.

Step 4: Identify the email address or addresses to which the information should be mailed.

monette_warren@ce9.uscourts.gov

Submit

Clear

Figure 7

STEP 5

Verify the information that was submitted.(See Figure 8)

- ◆ If you put a check mark inside any of the first three boxes the display screen will indicate that function is on. (i.e., *Summary Mail = on*).
- ◆ If you left the box blank, the display screen would signify no response, which would indicate you are not requesting said notice.(i.e., *Mail notice of electronic filings =*).
- ◆ If you've entered an incorrect case number, the screen will display (i.e., 98-3874 is not a valid case).

Send Notificaton in all cases for which you represent a party = on

Case list

[44-1982 Monette Warren](#)

[44-7400 Valerie J. Smith](#)

[44-6059 Thomas L. Hastings and Jose Chico](#)

[44-6224 Donnie McClurkin and Danielle McClurkin](#)

Mail notice of electronic filings =

Summary Mail = on

Mail Address

monette_warren@ce9.uscourts.gov

Figure 8

Note: To add additional case(s) to receive notification, repeat process.

To delete a case you no longer want to receive notification.

- ◆ Access [Set Automatic Mail Notification](#) hypertext link.
- ◆ Process Step 1: *Identify the cases for which you would like to receive notification of activity.*
- ◆ Remove check mark to indicate no notification requested.
- ◆ Enter the case number you no longer want to receive notification.
- ◆ Click on the [**Submit**] button.

Note: You have deleted any further notification of selected cases.

Docket Sheet

This will allow the user to view and print the docket for a specific case.

STEP 1 Click on the [Docket Sheet](#) hypertext link under Case(s) Reports

STEP 2 The **Selection Criteria** screen will appear. (See Figure 1)

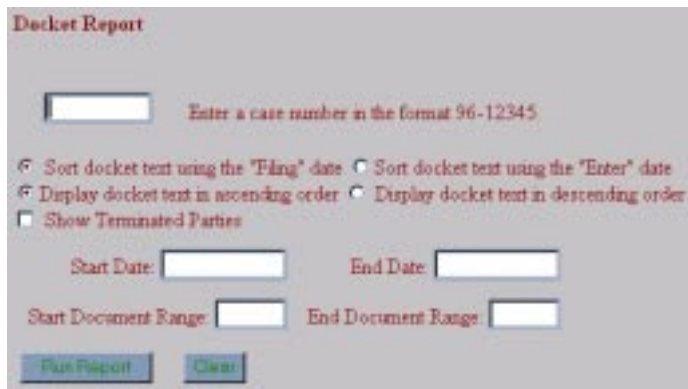


Figure 1

- ◆ Enter the case number. Use the tab key to advance to the next field.
- ◆ To sort docket text using the "Filing" date, click on that option.
- ◆ To sort docket text using the "Enter" date, click on that option.
- ◆ Click inside the *Starting Date* field and *Ending Date* field to indicate the dates that the report will display.
- ◆ Click inside the *Start Document Range* and *End Document Range* fields to retrieve information by docket number entry.
- ◆ Click on the [**Run Report**] button to continue.

STEP 3 The **Case Docket** screen will appear. (See Figure 2)



- ◆ Click on the docket number hypertext link to view the specific document.
- ◆ Select the print button on the Netscape power tool bar to print the docket sheet.

Query Module

The query module is an application that retrieves case information. It is available in the ECF System. It will provide a variety of inquiries for specific cases, including attorney, party, judge, associated cases and notice of filing information as well as printing capabilities.

1.0 Accessing Query Module

The Query Module can be accessed by clicking on the **Reports** event located on the DCN Access Menu Bar. A **Case(s) Report** screen will appear. (See Figure 1). Click on the **Query Module** hypertext link.



Figure 1

A **Query Search Clues** window will appear. (See Figure 2)

The screenshot shows a window titled "Query Search Clues". It contains a form with several input fields: "Case Number", "Last Name", "First Name", "Middle Name", "SSN", "Type" (a dropdown menu), and "Tax ID". At the bottom of the form are two buttons: "RunQuery" and "Clear".

Figure 2

1.1 Finding a Case

The target case can be searched for in the following ways:

- the case number
- interested party
- social security number, or
- a tax identification number

The fastest way is to type the case number in the first field of the Search Clues window. For example:

98-30000

where "98" is the year and "30000" is the case sequence number. You must enter a dash between the case year and number sequence, however; you do not have to enter leading zeros, and if you want, you can type in all four digits of the case year (i.e., "1998-30000"). Click on the **RunQuery** button to perform the search. To search by name just leave the Case Number *field* blank and type the name in the name field (Last,First, Middle). If you only know part of the name, you can use wildcards. A wildcard is any combination of letters. For example, if you type "Wilki", you will match "Wilkin", "Wilkins", "Wilkinson", and in fact any names that start with the letters you typed. In the **Type** field click the down arrow to open the type picklist (atty, court, creditor, judge, party, etc.) and select the desired party. Click on the [Run Query] button to start the search. A Select a Person screen will appear with names that match your search clue. Click on the desired name.

Once a person has been identified and selected, the Query application will display a **Short Case Summary** window (See Figure 4) with information such as Case Number, Debtor(s) name, Bankruptcy Chapter, and Judge. It will also display menu items under **Available Query Options**.

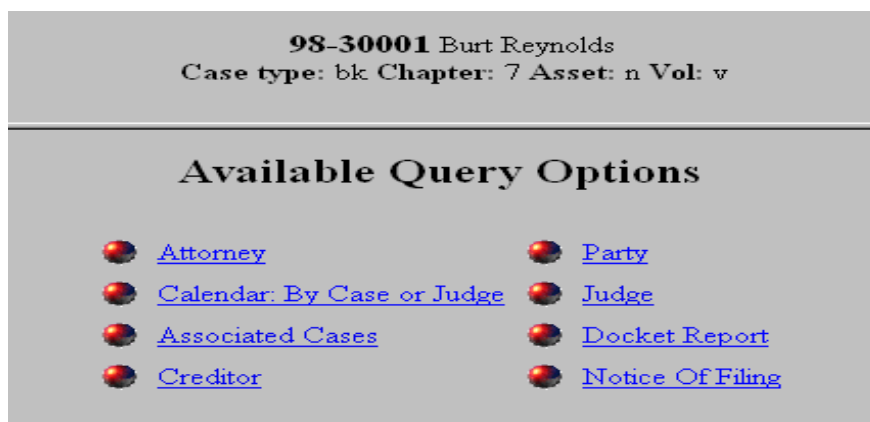


Figure 3

1.2 Query

Menu Options

The following menu items are summarized in the next eight tables: Attorney, Calendar by Case or Judge, Associated Cases, Creditors, Party, Judge, Docket Report, Notice of Filing.

Item	Action
Attorney	Displays attorney(s) associated with the case

Item	Action
Calendar: By Case or Judge	Display matters scheduled for hearing for each judge, with date, time and location. (Note: See job aid on Calendar by Case or Judge)

Item	Action
Associated Cases	Displays cases related to the case (i.e. Adversaries).

Item	Action
Creditor	Displays the creditors in the case.

Item	Action
Party	Displays all parties associated with the case.

Item	Action
Judge	Displays the judge assigned to the case.

Item	Action
Docket Report	Displays the case docket. Prints case docket. (Note: See job aid on "Docket Sheet".)

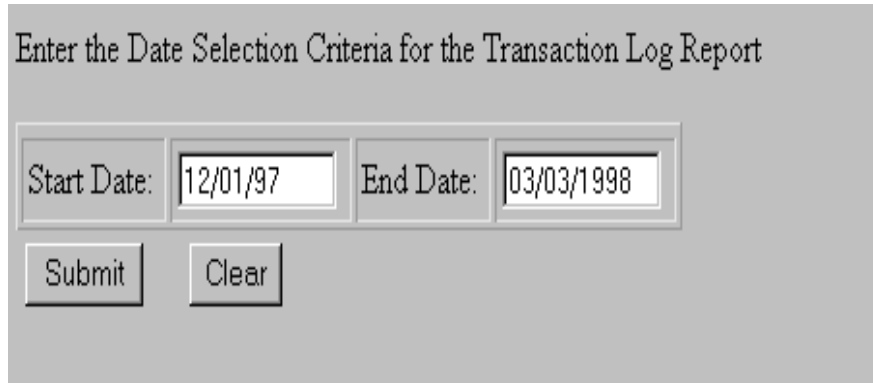
Item	Action
Notice of Filing	Displays a Notice of Electronic Case filing with date, time and court seal. You can print the notice.

View Transaction Log

This report will list all transactions made by an individual on a case based login.

STEP 1 Click on [View Transaction Log](#) hypertext link under Other Reports.

STEP 2 The **Data Selection Criteria** screen will appear. (See Figure 1)



Enter the Date Selection Criteria for the Transaction Log Report

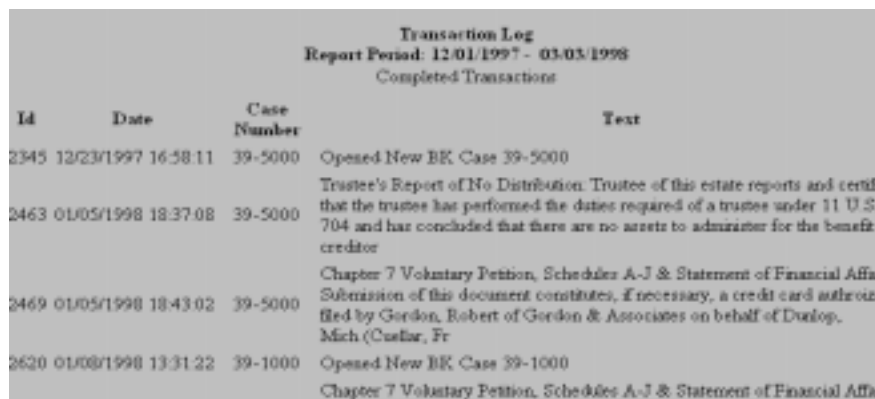
Start Date:	12/01/97	End Date:	03/03/1998
-------------	----------	-----------	------------

Submit Clear

Figure 1

- ◆ Click inside the *Starting Date* and *Ending Date* fields to indicate the dates the report will display.
- ◆ Click on the **[Submit]** button to continue.

STEP 3 The **Transaction Log** screen will appear. (See Figure 2)



Id	Date	Case Number	Text
2345	12/23/1997 16:58:11	39-5000	Opened New BK Case 39-5000
2463	01/05/1998 18:37:08	39-5000	Trustee's Report of No Distribution. Trustee of this estate reports and certifies that the trustee has performed the duties required of a trustee under 11 U.S.C. 704 and has concluded that there are no assets to administer for the benefit of creditor.
2469	01/05/1998 18:43:02	39-5000	Chapter 7 Voluntary Petition, Schedules A-J & Statement of Financial Affairs. Submission of this document constitutes, if necessary, a credit card authorization by Gordon, Robert of Gordon & Associates on behalf of Dunlop, Mich.(Custlar, Fr
2620	01/08/1998 13:31:22	39-1000	Opened New BK Case 39-1000
			Chapter 7 Voluntary Petition, Schedules A-J & Statement of Financial Affairs

Figure 2

- ◆ Select the print button on the Netscape power tool bar to print the report.

Cases Filed Report

This report will display Cases Filed, Discharged, Dismissed, Closed and Converted.

STEP 1 Click on the [Cases Filed](#) hypertext link.

STEP 2 The **Select Criteria** screen will appear. (See Figure 1)

Enter the Selection Criteria for Cases Filed Report:

Terminal Digit:

Case Type: Chapter: Office:

ap bk 7 9 3

Judge: Adler, Louise DeCarl
Bowie, Peter W.
Hargrove, John J.
Meyers, James W.

Trustee: Akers, Gregory A.
Boldt, Ralph O.
Chaco, Jorgette
Cuellar, Fred

Sort by: 1st Case Number 2nd 3rd 4th

Date	Filed	Entered	Discharged	Dismissed	Closed	Converted
Start	1/1/1990					
End	03/20/1998					

☒ Open Cases Only ☒ Show Borders on Report

Run Report Clear

Figure 1

- ◆ **Terminal Digit** field click in the box and type the terminal digit(s) for the report to display. For example (00-99, 7, 6).
- ◆ **Case Type** field click on bk.
- ◆ **Chapter** field click on case chapter.
- ◆ **Judge** field click on a judge or leave blank.
- ◆ **Trustee** field click on a trustee or leave blank.
- ◆ **Sort By** field click on the down ▼ arrow to the right of the box and click on an option for the report to display. **Note:** If you want the report to display more than one criteria, repeat the process in the other boxes.
- ◆ **Date** field click in the report box (Filed, Entered, Discharge, Dismissed, Closed, Converted) and type in a start date and end date for the report to display.
- ◆ **Open Cases** field click in the box to run the report on open cases.
- ◆ Click on **[Run Report]** button.

STEP 3 The **Report** screen will appear. (See Figure 2)

U.S. Bankruptcy Court Genetic Bankruptcy Court Cases Filed Report for 03/20/1998									
Case No. Closed	Tr	Ch	Case Title	Judge Trustee	Asst	Dates	Fee	County	
4-30000-A	bk	7	Ngoryen T. Nguyen	Adler Alcers	n	Filed: 03/13/1998	c	06073	
4-30000-A	bk	7	Ngoryen T. Nguyen	Adler Davis	n	Filed: 03/13/1998	c	06073	
97-00001-A	bk	7	John Nomoney	Adler Boldt	n	Filed: 03/12/1998	p	06073	
97-00002-A	bk	7	Jorgette Chaco	Adler Chaco	n	Filed: 03/12/1998	p		
97-00002-A	bk	7	Jorgette Chaco	Adler Davis	n	Filed: 03/12/1998	p		

Figure 2

- ◆ Click on the print button from the Netscape power tool bar to print the report.
- ◆ Click on the hypertext link to view the case docket.

Pending Deadlines/Hearing Report

This report will provide a list of case(s) with pending deadlines.(i.e., Claims Bar Date, Objections due, Pending hearings, Chapter 11 Plan)

STEP 1 Click on [Pending Deadlines/Hearing Report](#) from the hypertext link.

STEP 2 The **Select Criteria** screen will appear. (See Figure 1)

The screenshot shows a web form titled "Pending Deadlines/Hearings Report". It contains several sections for selecting criteria:

- Judge:** A list box with names: Adler, Louise DeCarl; Bowie, Peter W.; Hargrove, John J.; Meyers, James W.
- Trustee:** A list box with names: Akers, Gregory A.; Boldt, Ralph O.; Chaco, Jorgette; Cuellar, Fred; Davis, Gerald H.
- Office:** A list box with "San Diego".
- Deadlines/Hearings to include:** A list box with options: All Deadlines, All Hearings, 341 Meeting, Administrative Bar Date, Answer Deadline.
- Deadline Due/Hearing Set between:** Two date input boxes, both containing "3/20/1998", separated by "and".
- Chapter:** Checkboxes for 7, 11, 12, and 13, all of which are checked.
- Terminal Digit(s):** An empty text input box.
- Adversary/Bankruptcy:** Checkboxes for "Adversary" and "Bankruptcy", both of which are checked.
- Sort by:** Four dropdown menus. The first is set to "Judge Name", the second to "Case No.", and the others are empty.
- Buttons:** "Run Report" and "Clear".

Figure 1

- ◆ **Judge** field click on a judge or leave blank.
- ◆ **Trustee** field click on the down ▼ arrow to scroll through the list and then click on a trustee or leave this field blank.
- ◆ **Office** location field click on San Diego.
- ◆ **Deadlines/Hearings to include** field click on the down ▼ to the right of the box and scroll through the event list to select an event.
- ◆ **Deadline Due/Hearing Set between** field click in the boxes and type dates for the report to display.
- ◆ **Chapter** field click in the applicable box.
- ◆ **Terminal Digit(s)** field click in the box and type the terminal digits. For example (00-99, 7, 6).
- ◆ **Adversary** or **Bankruptcy** field click in the box.
- ◆ The **Sort By** field gives you four boxes in which to select criteria. Click on the down ▼ arrow to the right of each box to select the criteria for the report to display.
- ◆ Click on the **[Run Report]** button.

STEP 3 The **Pending Deadlines/Hearings Report** screen will appear. (See Figure 2)

Pending Deadlines/Hearings Report U.S. Bankruptcy Court-Generic Bankruptcy Court Report Period: 01/01/1997 - 03/20/1998				
Case Number	Case Name	Deadline/Hearing	Date Due/Set	Notes
98-30012-B	Danuta Saladyga	Deadline: Objection for Discharge due	Due: 03/13/1998 Time:	Chapter: 7 Filed: 03/02/1998 Office: San Diego Type: Bankruptcy Judge: Bowie, Peter Terminal Digit: 12 Trustee: Akers, Gregor
				Chapter: 7 Filed: 03/13/1998 Office: San Diego

Figure 2

- ◆ Click on the print button from the Netscape power tool bar to print the report.
- ◆ Click on the case number hypertext link to view the docket.